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ACCOUNTS AND PAPERS:

FORTY-SEVEN VOLUMES.

— *(38.)* —

COMMERCIAL REPORTS—*continued.*

Session

12 *March* 1894 —— 25 *August* 1894.

VOL. LXXXVIII.

1894.

ACCOUNTS AND PAPERS:

FORTY-SEVEN VOLUMES

—(38.)—

COMMERCIAL REPORTS—continued

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FORTY-SEVEN VOLUMES:—CONTENTS OF THE

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[c. 7293.] Trade Reports (Annual Series), 1894, Nos. 1330 to 1459.

Spain:

No. 1354. Report for the Year 1893 on the General Trade of Spain (Reference to previous Report, Annual Series, No. 1239). p. 1

No. 1355. Report for the Year 1893 on the Trade and Sanitary Condition of the Canary Islands (Reference to previous Report, Annual Series, No. 1296). 31

No. 1356. Report for the Year 1893 on the Trade, &c., of the District of the Consulate General at Havana (Reference to previous Report, Annual Series, No. 1213). 37

No. 1359. Report for the Year 1893 on the Trade of Cadiz and District (Reference to previous Report, Annual Series, No. 1269). 69

No. 1398. Report for the Year 1893 on the Trade of Bilbao (Reference to previous Report, Annual Series, No. 1278). 89

No. 1404. Report for the First Quarter of 1894 on the Imports and Exports of Spain (Reference to previous Report, Annual Series, No. 1354). 129

No. 1437. Report for the Year 1893 on the Agricultural Condition of the Consular District of Malaga (Reference to previous Report, Annual Series, No. 800). 141

No. 1444. Report on the Spanish Estimates for the Year 1894–95 (Reference to previous Report, Annual Series, No. 1246). 151

No. 1445. Report for the Year 1893 on the Trade, &c., of the Consular District of Malaga (Reference to previous Report, Annual Series, No. 1282). 187

No. 1454. Report for the Year 1893 on the Trade, &c., of the Consular District of Barcelona (Reference to previous Report, Annual Series, No. 1225). 229

Sweden:

No. 1344. Report for the Year 1893 on the Trade, &c., of the Consular District of Stockholm (Reference to previous Report, Annual Series, No. 1256). 255

No. 1434. Report for the Year 1893 on the Trade of Gothenburg (Reference to previous Report, Annual Series, No. 1247). 287

Tunis:

No. 1423. Report for the Year 1893 on the Trade of Tunis (Reference to previous Report, Annual Series, No. 1293). p. 319

Turkey:

No. 1346. Report for the Year 1893 on the Trade, &c., of the Consular District of Trebizond (Reference to previous Report, Annual Series, No. 1173). 337

No. 1350. Report for the Year 1893 on the Trade of the Consular District of Jerusalem (Reference to previous Report, Annual Series, No. 1186). 353

No. 1368. Report for the Year 1893 on the Trade, &c., of Angora (Reference to previous Report, Annual Series, No. 1099). 363

No. 1384. Report for the Year 1893 on the Trade of the District of the Constantinople Consulate General (Reference to previous Report, Annual Series, No. 1224). 379

No. 1403. Report for the Year 1893 on the Trade of Aleppo (Reference to previous Report, Annual Series, No. 1200). 411

No. 1411. Report for the Year 1893 on the Trade of Damascus (Reference to previous Report, Annual Series, No. 1261). 427

No. 1418. Report for the Year 1893 on the Trade, &c., of Beyrout (Reference to previous Report, Annual Series, No. 1279). 439

No. 1424. Report for the Year 1893 on the Trade of Baghdad and Bussorah (Reference to previous Report, Annual Series, No. 1320). 455

No. 1426. Report for the Year 1893 on the Trade of the Consular District of Erzeroum (Reference to previous Report, Annual Series, No. 1242). 467

No. 1451. Report for the Year 1893 on the Trade, &c., of the Consular District of Jeddah (Reference to previous Report, Annual Series, No. 1264). 483

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United States:

No. 1336. Report for the Year 1893 on the Trade, &c., of the Consular District of Galveston (Reference to previous Report, Annual Series, No. 1164). 513

No. 1339. Report for the Year 1893 on the Trade, &c., of the Consular District of Boston (Reference to previous Report, Annual Series, No. 1181). 551

No. 1340. Report for the Year 1893 on the Trade, &c., of the Consular District of Baltimore (Reference to previous Report, Annual Series, No. 1176). 571

No. 1367. Report for the Year 1893 on the Trade of New Orleans and District (Reference to previous Report, Annual Series, No. 1205). 589

No. 1379. Report for the Year 1893 on the Agricultural Condition of the Consular District of Boston and Farming in New England States (Reference to previous Report, Annual Series, No. 398). 633

No. 1381. Report for the Year 1893 on the Trade of the District of the Consulate General of New York (Reference to previous Report, Annual Series, No. 1274). 649

No. 1390. Report for the Year 1893 on the Trade of the Consular District of New Orleans (Reference to previous Report, Annual Series, No. 1205). 677

No. 1397. Report for the Years 1892-93 on the Trade of Philadelphia and District (Reference to previous Report, Annual Series, No. 1078). 699

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No. 1431. Report on the Agricultural Condition of Texas. 811

No. 1438. Report for the Year 1893 on the Trade of the Consular District of Chicago (Reference to previous Report, Annual Series, No. 1233). 853

No. 1452. Report for the Year 1893 on the Trade, &c., of the Consular District of San Francisco (Reference to previous Report, Annual Series, No. 1251). 893

Venezuela:

No. 1386. Report for the Year 1893 on the Trade of the Consular District of Caracas (Reference to previous Report, Annual Series, No. 1207). p. 997

No. 1422. Report for the Year 1893 on the Trade, &c., of Maracaibo (Reference to previous Report, Annual Series, No. 1207) (p. 9). 1021

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SPAIN.

MADRID.

Sir H. D. Wolff to the Earl of Kimberley.

My Lord, *Madrid, March* 31, 1894.

I HAVE the honour to transmit herewith a Report drawn up by Sir George Bonham on the Commerce of Spain during 1893.

I have, &c.

(Signed) H. DRUMMOND WOLFF.

Report on the Trade and Commerce of Spain for the Year 1893.

ABSTRACT of Contents.

	PAGE
Introductory remarks—	
Protectionist policy	2
Loss from exchange	3
Tables of imports and exports during 1891–93	3–6
Causes of diminution—	
Tariff of 1892	7
Increased revenue from customs	7
Principal changes as regards imports	8–15
Cotton	9
Linen	9
Wool	10
Cereals	13
Special commerce	14
Principal changes as regards exports	15–24
Minerals	15
Cotton	17
Wool	18
Boots and shoes	19
Wine	19–24
Remarks on	23
Shipping statistics	24–26
Appendix	27

NOTE.—The exchange is throughout calculated at par, 25 pesetas = 1*l*.

Introductory remarks.

A report on the commerce of Spain for 1893 must necessarily be confined to a review of the statistics published by the Customs Department on imports and exports for that year. Detailed statistics cannot be forthcoming for a long time, as the annual volume for 1892 has not yet been published.

Although these returns afford but little of the information which might be looked for respecting the countries of origin and destination, they at all events give the latest facts available respecting the foreign commerce of Spain. It would therefore appear preferable to send information for last year, even though incomplete, rather than to await the publication of fuller details with regard to a previous year, which may be supplied later should it be considered advisable.

Madrid not being in any sense a commercial centre, British merchants and others interested in Spanish trade will naturally turn for information to Consuls or other commercial authorities in those districts where the industries in which they are interested are situated, and who have greater facilities for acquiring it. The special report by H.M.'s Consul at Barcelona on the textile industries of Catalonia, issued last September, appears to give in a concise form the reasons for the recent diminution of the imports of English cotton and woollen goods into Spain, and the increasing exports of that class of goods to the Spanish colonies.

A Protectionist policy, dating from 1892, has undoubtedly stimulated the production of Spanish textiles, and the tariff advantages accorded to them in Spanish colonies gives them an advantage over goods of a similar description from other countries. The increased exportation of Spanish textiles to Mexico, the Argentine Republic, and Brazil is, however, a matter for the consideration of British manufacturers.

As the fact has, perhaps, not been sufficiently emphasised in the comparison between the values of imports during the 3 years 1891, 1892, and 1893, it should be borne in mind that the imports during 1891 and the first 6 months of 1892 were unduly stimulated by the anxiety on the part of importers to replenish their stocks before the provisions of the new tariff came into force.

Effects of present tariff.

That tariff has now been in operation for 18 months, with the effects which are indicated in the returns. Whether it will continue in force after the close of the session of the Cortes which is about to commence, and in which commercial arrangements will form a prominent feature, is a question on which it would be premature to speculate.

A report on the operation of the present tariff has been published by the Madrid Chamber of Commerce, as it contains particulars of interest relating to the imports of coal, textiles, and machinery which directly affect British trade, they are given in connection with those industries.

Among the untoward circumstances which have affected

Spanish trade during 1893 may be mentioned the disastrous explosion at Santander by which property to a large extent was destroyed, and the uncertainty which for some time prevailed as to the result of the conflict with Morocco. The latter has now ended in a manner satisfactory to Spain, so that some revival of trade may be looked for. To these difficulties with which Spain has to contend must be added the loss from the exchange. Although the matter will be again alluded to in connection with Spanish finance, to which subject it more properly belongs, it may here be stated that Spain having annually to make large payments in gold abroad there is a continual drain of that metal beyond the frontier. These payments are regulated (1) by the difference between the values of imports and exports, amounting in 1893 to 58,193,944 pesetas (2,327,757*l.*); (2) by the coupon of the external debt, amounting to 80,000,000 pesetas (3,200,000*l.*); (3) by the amount payable as dividend to foreign companies, amounting to 100,000,000 pesetas (4,000,000*l.*). This large sum, amounting to over 9,000,000*l.*, is liable to be further increased rather than diminished by the falling-off in the export of wines to France for reasons which are explained later, and also in minerals; the two branches formerly constituting about 30 per cent. of Spanish commerce. Effect of loss from the exchange.

Without entering on the question of bi-metallism, the fact which is given on high authority may be recorded, that, in consequence of the premium on gold and the rise in the exchange, the gold in the country is rapidly becoming exhausted, with the result that in payments which have to be made abroad a loss is sustained amounting to about 21 per cent.

The total value of imports during the 3 years 1891, 1892, and 1893, as shown by the custom-house returns of which a summary is given in the accompanying table, is as follows:— Imports.

Year.	Value.	
	Currency.	Sterling.
	Pesetas.	£
1891	873,833,503	34,953,340
1892	751,723,597	30,068,943
1893	684,824,976	27,392,999

The progressive diminution thus shown has occurred in every class of the tariff if the year 1893 is compared with 1891. When compared with 1892 there is shown to be a slight increase in the classes of drugs and chemical products, silk and paper, and also in that of articles of food, owing mainly to the large imports of wheat.

The total value of exports during the same 3 years is shown to have been:— Exports.

Year.	Value.	
	Currency.	Sterling.
	Pesetas.	£
1891	803,814,728	32,152,589
1892	663,022,145	26,520,885
1893	626,631,032	25,065,241

NOTE.—These figures are for general and special commerce, and do not include values of goods intended for re-exportation or imported temporarily.

Although in some classes, such as manufactured cotton goods, woollen textiles, and also that of animals, there have been increases, they are more than counterbalanced by the very large diminution in the class of alimentary substances comprising the important class of wines.

The following tables give in a summarised form the values of imports and exports during the years 1891, 1892, and 1893, according to the classes of the tariff:—

Table I.—RETURN showing Value of Imports into Spain during the Years 1891-93.

Classes of the Tariff.	Description.	Sterling.			Currency.		
		1891.	1892.	1893.	1891.	1892.	1893.
		£	£	£	Pesetas.	Pesetas.	Pesetas.
1	Minerals, crystal and pottery	3,261,998	3,058,178	2,841,371	81,549,953	76,454,474	71,034,295
2	Metals and metal work	1,412,061	1,205,870	925,852	35,301,537	30,146,773	23,146,307
3	Drugs and chemical products	2,177,478	1,903,919	2,051,462	54,436,961	47,597,987	51,286,572
4	Cotton and cotton textiles	4,064,817	3,959,713	3,441,819	101,620,440	98,992,830	86,045,476
5	Other vegetable tissues	1,387,830	1,290,356	1,149,570	34,695,754	32,258,905	28,739,259
6	Wool and woollen textiles	1,642,898	1,467,953	1,056,367	41,072,450	36,698,842	26,409,192
7	Silk and silk tissues	779,195	771,472	773,046	19,479,876	19,286,803	19,326,158
8	Paper and its appliances..	429,769	362,841	435,655	10,744,232	9,071,037	10,891,382
9	Wood, rough and manufactured	2,102,028	2,168,601	1,846,136	52,550,704	54,215,026	46,153,406
10	Anima's and animal substances..	1,823,613	1,543,100	1,474,035	45,590,328	38,577,517	36,850,898
11	Machinery, carriages and vessels	2,084,756	2,016,578	1,451,681	52,118,909	50,414,451	36,292,037
12	Alimentary substances	7,332,780	6,540,017	7,141,791	183,319,513	163,500,437	178,544,795
13	Miscellaneous	291,369	244,244	216,789	7,284,244	6,106,119	5,419,735
	Special imports	6,162,744	3,536,095	2,587,418	154,068,602	88,402,396	64,685,464
	Total	34,953,336	30,068,937	27,392,992	873,833,503	751,723,597	684,824,976

Table II.—RETURN showing Value of Exports from Spain during the Years 1891–93 (taken from Table of Official Values).

Classes of the Tariff.	Description.	Sterling.			Currency.		
		1891.	1892.	1893.	1891.	1892.	1893.
		£	£	£	Pesetas.	Pesetas.	Pesetas.
1	Minerals, crystal and pottery	3,166,731	3,134,069	3,158,370	79,168,275	78,351,741	78,959,269
2	Metals and metal work	5,002,556	5,519,026	4,992,942	125,063,913	137,975,672	102,823,554
3	Drugs and chemical products	1,120,085	1,098,447	1,087,234	28,002,140	27,461,190	27,180,865
4	Cotton and cotton textiles	1,120,795	1,609,329	1,946,859	28,019,894	40,233,239	48,671,497
5	Other vegetable tissues	162,310	239,602	255,564	4,057,765	5,990,053	6,389,107
6	Wool and woollen textiles	458,570	666,489	867,615	11,464,258	16,662,249	21,690,385
7	Silk and silk tissues	187,962	230,365	161,562	4,699,057	5,759,126	4,039,051
8	Paper and its appliances	363,614	449,082	367,674	9,090,365	11,227,060	9,191,869
9	Wood, rough and manufactured	1,403,101	1,292,224	1,190,568	35,077,530	32,305,605	29,764,215
10	Animals and animal substances	1,771,812	1,593,176	1,805,557	44,295,324	39,829,412	45,138,928
11	Machinery, carriages and vessels	32,390	18,364	37,725	809,756	459,105	943,139
12	Alimentary substances	17,270,735	10,544,589	9,992,018	431,768,381	263,613,251	249,800,462
13	Miscellaneous	91,922	126,177	101,547	2,298,070	3,154,442	2,538,691
	Total	32,152,583	26,520,880	25,065,236	803,814,728	663,022,145	626,631,032

This downward tendency is directly attributable, according to the judgment of those who have made Spanish commerce their special study, to the protectionist policy introduced by Senor Canovas in 1891. That statesman, taking advantage of a provision made by the previous administration with a view to a revision of the Spanish tariff, proceeded to impose very high duties on foreign cereals which affected principally the produce of France, the United States, and Russia. The next step was to denounce the commercial treaties containing a most-favoured-nation treatment clause which was to have taken effect on February 1, 1892. In consequence, however, of the treaties with England and Holland not terminating till June of that year, the new tariff did not actually come into operation until July 1.

Causes of diminution of imports and exports.

With regard to the tariff of 1892, it need only be said that the duties imposed in the minimum column are almost all as high and in many cases higher than the duties imposed in the maximum column of the previous tariff of 1882. Besides imposing extremely high duties on foreign agricultural produce, it has hampered Spanish industries by duties on raw material, and has rendered the position of the labouring classes even less favourable than before by increased taxation of the necessaries of life.

Tariff of 1892.

The results of this policy from a commercial point of view are shown in the returns of imports and exports already given which are worked out in greater detail in the following pages.

The results from a financial point of view have been an increase in the custom-house receipts which is looked upon as some compensation for the evils of the monetary and commercial crisis through which the country is passing, the loss from the exchange, and the unsatisfactory financial position of some of the railways. The receipts for the first 6 months of 1893, the last published, amount to 72,238,955 pesetas (2,889,556*l.*); the receipts during the preceding twelvemonth being 126,791,328 pesetas (5,071,653*l.*); the total sum thus realised in 18 months is shown to be in excess of that realised in corresponding periods before the result of the new tariff had made itself felt, but the increased receipts are none the less levied on constantly diminishing imports.

Increased custom-house receipts.

Fallacious results.

As illustrating what has been stated with regard to the incidence of these taxes on the labouring classes, it is shown by the statistics from which I quote that the duties levied on the nine classes of imports enumerated, viz., spirits, sugar, salted codfish, cocoa, coffee, wheat-flour, petroleum, wheat, and other cereals, which amounted in 1891–92 to 36,196,240 pesetas (1,447,729*l.*), increased in 1892–93 to 52,523,596 pesetas (2,100,943*l.*), and that in the first 6 months of 1893–94 they have been 29,590,000 pesetas (1,183,600*l.*). Of this total, the duties paid on corn amounted to 7,402,121 pesetas (296,084*l.*) in 1891–92 to 26,780,239 pesetas (1,071,209*l.*), and to 15,378,414 pesetas (615,136*l.*) in the first 6 months of the present financial year. The duty on spirits has, on the other hand, been fixed so high that the imports have practically ceased.

Taking each class separately, the following would appear to be

Principal changes in imports.

among the more important changes which have taken place in the principal articles of import and exports:—

Minerals. As regards importation. The whole of Class I comprising minerals and ceramic products shows a progressive diminution. The values for the 3 years having been respectively as follows:—

Year.	Value.	
	Currency.	Sterling.
	Pesetas.	£
1891	81,549,953	3,261,998
1892	76,454,474	3,058,178
1893	71,034,295	2,841,371

The principal decreases being in coal, rectified mineral oils, glass, and crockery.

Next to the textile industries, coal is perhaps the article which most nearly affects British commerce, the imports having increased from 24,000,000 pesetas (960,000*l.*) in 1886 to about 45,000,000 pesetas (1,800,000*l.*) in 1891. It is stated by the Madrid Chamber of Commerce that whereas the present tariff which imposes a duty of 2 pesetas 25 c. instead of 1 peseta 25 c. per ton has undoubtedly stimulated the coal-mining industry, it has impeded the development of other national industries as the cost of transport and the difficulties of communication prevent due advantage being taken of the development of Spanish coal mines.

Metals. In Class II, comprising metals and metalwork, the diminution in the whole class has been very marked, the values for the 3 years respectively having been:—

Year.	Value.	
	Currency.	Sterling.
	Pesetas.	£
1891	35,301,537	1,412,061
1892	30,146,773	1,205,870
1893	23,146,307	925,852

The metals treated of are, iron, copper, and tin, the imports of the two latter are comparatively insignificant, but in those of iron comprising some 40 items of the tariff there has been an almost universal decline.

Drugs. In the third class, comprising drugs and mineral products, the value of imports is higher than in 1892, although not coming up to the level of the previous year, the values respectively being:—

Year.	Value.	
	Currency.	Sterling.
	Pesetas.	£
1891	54,436,961	2,177,478
1892	47,597,987	1,903,919
1893	51,286,572	2,051,462

The fourth class of the tariff relates to cotton, raw and manufactured. The total value of imports during the last 3 years having been :— Cotton.

Year.	Value.	
	Currency.	Sterling.
	Pesetas.	£
1891	101,620,440	4,064,816
1892	98,992,830	3,959,715
1893	86,045,476	3,441,819

The imports of the raw material alone having been, during the 3 years, as follows :—

Year.	Value.	
	Currency.	Sterling.
	Pesetas.	£
1891	85,022,428	3,400,897
1892	86,033,983	3,441,359
1893	75,478,032	3,019,121

They show a considerable diminution in many of the articles in which English trade is interested, in connection with which H.M.'s Consul at Barcelona has reported that since the introduction of a protectionist tariff the production of cotton textiles in Catalonia has increased from 15 per cent. to 20 per cent., and that the stuffs known as "vichyes," "figures," "brillantés," and "satines" can now compete in quality with those produced elsewhere.

In Class V., comprising other vegetable fibres and manufactures, the steady diminution of imports is shown by the returns for the last 3 years :— Linen and other fibres.

Year.	Value.	
	Currency.	Sterling.
	Pesetas.	£
1891	34,695,754	1,387,828
1892	32,258,905	1,290,356
1893	28,739,259	1,149,568

This class comprises linen goods, the importation of which from England, according to the very competent authority already quoted, has been steadily decreasing during the last 20 years in consequence partly of the competition of similar articles manufactured in Belgium but chiefly to the improving quality of Spanish cloths. The present duties are stated to be simply prohibitive, but the decrease in British imports had commenced before their introduction.

Wool. In Class VI., comprising wool and woollen manufactures, the diminished importation is shown by the returns for the 3 years :—

Year.	Value.	
	Currency.	Sterling.
	Pesetas.	£
1891	41,072,450	1,642,896
1892	36,698,842	1,467,952
1893	26,409,192	1,056,364

The value of unwashed wool amounted, in 1893, to 177,058 pesetas (7,082*l.*), whereas in 1892 it was 1,442,462 pesetas (57,696*l.*). The diminution in the imports is shown in the following more conspicuous instances :—

Articles.	1892.		1893.	
	Currency.	Sterling.	Currency.	Sterling.
	Pesetas.	£	Pesetas.	£
Carpets (pure wool or mixed	1,560,128	62,405	840,420	33,616
Felts of wool, pure or mixed	539,001	21,560	257,216	10,288
Pure woollen cloth ..	4,792,656	191,706	1,506,898	60,275
„ „ with warp or woof of cotton	614,777	24,591	35,276	1,411
Knitted goods, pure or mixed	3,494,440	139,777	1,309,660	52,386
Other tissues of pure wool	6,339,192	253,567	4,199,760	167,991

The development of the woollen industry and the consequent diminution of imports is one of the most important features to be noted in connection with Spanish commerce, several new factories for spinning, weaving, and dyeing wool having lately been established near Barcelona.*

Silk (Class VII.) is one of the articles in which the imports, as shown in the following table, have been somewhat higher in 1893 than in 1892, although not so high as in 1891 :— Silk.

Year.	Value.	
	Currency.	Sterling.
	Pesetas.	£
1891	19,479,876	779,192
1892	19,286,803	771,472
1893	19,326,158	773,044

Of this, the value of the raw material imported increased from 4,264,816 pesetas (170,592*l.*) in 1892 to 4,722,944 pesetas (188,917*l.*) in 1893.

In paper and its appliances (Class VIII.) there has been some increase, the amount imported in 1893, viz., 10,891,382 pesetas (435,655*l.*), being higher than in either of the two previous years.

In the class of wood and manufactures of wood (Class IX.) there has been but little alteration, the value of imports, however, showing some diminution, having been in the 3 years respectively—

Year.	Value.	
	Currency.	Sterling.
	Pesetas.	£
1891	52,550,704	2,102,028
1892	54,215,026	2,168,600
1893	46,153,406	1,846,136

With regard to Class X., comprising animals and animal products, there is a diminution in the class as a whole, although in horned cattle and also in hides there is an increase. There is, however, a very considerable decrease in the importation of fat stock.

In Class XI., which comprises machinery, carriages, and vessels, a considerable diminution is observable, more especially as regards agricultural machinery, the importation of which has fallen from 1,148,729 pesetas (45,948*l.*) in 1891 to 355,579 pesetas (14,212*l.*) in 1893.

In the important class of "alimentary substances," the following changes are noticeable. The large increase in the importation of wheat is shown in the following table, which also gives the countries of origin :— Food stuffs.

* For further information relative to the woollen industry see appendix.]

TABLE showing the Quantity and Value of the Importation of Wheat, with Countries of Origin, during the Years 1891–93.

Country.	Tons of 1,000 Kilos.			Value in Sterling.			Value in Currency.		
	1891.	1892.	1893.	1891.	1892.	1893.	1891.	1892.	1893.
				£	£	£	Pesetas.	Pesetas.	Pesetas.
United States	20	21,087	51,811	163	168,698	414,490	4,080	4,217,464	10,362,258
France	9,555	15,233	32,425	76,445	121,871	259,403	1,911,129	3,046,780	6,485,080
Russia	98,836	39,277	126,638	788,479	314,177	1,013,110	19,711,977	7,854,449	25,327,765
Turkey	22,417	27,708	62,836	179,342	221,668	502,689	4,483,565	5,541,722	12,567,232
Other countries	24,271	35,495	141,463	196,389	284,004	1,131,706	4,909,727	7,100,106	28,292,652
Total	155,099	138,800	415,173	1,240,818	1,110,418	3,321,398	31,020,478	27,760,521	83,034,987

There has also been an increase in the importation of wheat-flour from various countries during 1893, as shown by the following table, by far the largest amount coming from France :—

Country.	Tons of 1,000 Kilos.		
	1891.	1892.	1893.
Germany	..	20	9
Austria	46	1	17
Belgium..	29	..	1
France	3,706	4,410	4,278
Other countries	421	622	2,824
Total	4,202	5,053	7,129

Of other foreign cereals there has been a remarkable decrease, the imports from Roumania alone showing an increase, as shown by the following table :—

Country.	Tons of 1,000 Kilos.		
	1891.	1892.	1893.
France	10,285	1,262	699
Morocco..	8,483	3,924	4,006
Roumania	4,701	1,652	8,376
Russia	8,831	592	756
Turkey	10,198	4,303	2,171
Other countries	25,843	15,280	2,908
Total	68,341	27,013	18,916

Sugar. The statistics of the importation of sugar show a remarkable decrease, amounting to over 50 per cent. between 1891 and 1893, that from Cuba alone having fallen from 29,378,938 pesetas (1,175,156*l.*) to 5,677,652 pesetas (227,106*l.*). There has been a corresponding increase in the production of beetroot-sugar in the southern provinces.

Coffee. Under the heading of coffee from Cuba there has also been a considerable falling-off, the value of the amount imported having fallen from 426,592 pesetas (17,063*l.*) in 1892 to 125,226 pesetas (5,008*l.*) in 1893. There was, on the other hand, a large increase in the amount imported from Porto Rico, the value of which is given as 14,634,888 pesetas (585,392*l.*), whereas the total imports of coffee amounted to only 15,934,761 pesetas (637,390*l.*).

Wines. The importation of wines, as might be expected in a wine-producing country, is not very important, but, such as it is, it has fallen off very considerably since 1891, the amount of sparkling wine having decreased from 259,213 litres in 1891 to 98,198 litres

in 1893. The importation of spirits from Germany, which in 1891 amounted to 267,114 hectolitres, practically ceased in 1893 on account of the prohibitive duty.

Miscellaneous.

Class XIII. includes miscellaneous articles of various descriptions, such as lace, ornaments, buttons, and preparations of indiarubber, the total values imported having been—

Year.	Value.	
	Currency.	Sterling.
	Pesetas.	£
1891	7,284,244	291,368
1892	6,106,119	244,244
1893	5,419,785	216,788

Special commerce.

Special imports, according to the following table of values, show a progressive diminution. They comprise material for railway construction, machinery for agricultural colonies, and tobacco :—

Year.	Value.	
	Currency.	Sterling.
	Pesetas.	£
1891	154,068,602	6,162,744
1892	88,402,396	3,536,095
1893	64,683,464	2,587,338

Railway material.

The following statistics show, in some measure, the tendency of railway construction, rails having been imported in 1893 to the extent of 18,592 tons, whereas the amount in 1891 was 12,451 tons, and in 1892, 11,210 tons. Ironwork for the construction of bridges during 1893 remained at 511 tons, having in 1892 amounted to 1,194 tons. The importation of rolling stock is, perhaps, better indicated by values than by weight :—

Description.	1893.		1892.	
	Currency.	Sterling.	Currency.	Sterling.
	Pesetas.	£	Pesetas.	£
1st class carriages ..	89,389	3,575	255,479	10,219
2nd class ,, ..	118,149	4,725	103,101	4,124
3rd class ,, .	150,927	6,037	396,494	15,859
Trucks of all descriptions	323,425	12,937	1,033,160	41,326

The imports of tobacco for the regie remain at about the same figure, the amount of raw tobacco having been in the 3 years as follows:— Tobacco.

Year.	Quantity.	Value.	
		Currency.	Sterling.
	Tons.	Pesetas.	£
1891	19,598	24,884,762	995,390
1892	17,884	27,240,177	1,089,606
1893	19,670	27,206,001	1,088,240

This does not include cigars or prepared tobacco.

Turning to exports, the returns for Class 1, comprising minerals, &c., show that there has been an increase in the export of argentiferous sulphate of lead, "galena," the amount and value of that metal having been as follows:— Exports. Minerals.

SULPHATE OF LEAD.

Year.	Quantity.	Value.	
		Currency.	Sterling.
	Tons of 1,000 kilos.	Pesetas.	£
1891	7,332	3,153,094	126,121
1892	13,189	5,671,371	226,854
1893	11,716	5,000,141	200,005

The other mineral ores of which the exports are considerable are copper and iron, which show the following fluctuations:—

COPPER.

Year.	Quantity.	Value.	
		Currency.	Sterling.
	Tons of 1,000 kilos.	Pesetas.	£
1891	661,762	25,146,989	1,005,879
1892	511,115	19,422,383	776,895
1893	174,934	21,957,500	878,300

IRON ORE.

Year.	Quantity.	Value.	
		Currency.	Sterling.
	Tons of 1,000 kilos.	Pesetas.	£
1891	4,343,884	43,438,840	1,737,553
1892	4,799,647	43,196,829	1,727,873
1893	4,646,877	42,821,897	1,712,875

IRON PIRITES.

Year.	Quantity.	Value.	
		Currency.	Sterling.
	Tons of 1,000 kilos.	Pesetas.	£
1891	283,721	2,837,216	113,488
1892	443,026	4,430,261	177,210
1893	399,880	4,002,800	160,112

Metals. In Class 2, comprising metals and metalwork, the following changes are the most noteworthy :—

LEAD, ARGENTIFEROUS, IN PIGS.

Year.	Quantity.	Value.	
		Currency.	Sterling.
	Tons of 1,000 kilos.	Pesetas.	£
1891	72,386	39,812,818	1,592,515
1892	75,313	30,125,339	1,205,015
1893	83,152	33,261,078	1,330,443

Of this the amount exported to France during the 3 years under review was :—

Year.	Quantity.	Value.	
		Currency.	Sterling.
	Tons of 1,000 kilos.	Pesetas.	£
1891	25,420,173	13,981,095	559,243
1892	27,443,335	10,977,334	439,093
1893	24,453,627	9,781,451	391,258

In Class 3, comprising drugs and chemical products, the total amount of exports has not varied to any great extent during the last 3 years. The amount of chloride of sodium (common salt) exported shows some diminution, the amounts having been :—

Year.	Quantity.
	Tons of 1,000 kilos.
1891	225,770
1892	231,912
1893	200,924

and of tartar and lees of wine, an article principally exported to France, the total exports were :—

Year.	Quantity.
	Tons of 1,000 kilos.
1891	6,160
1892	5,738
1893	5,939

Cottons.

The export of cotton goods (Class 4) is comprised under three articles of the tariff, namely, white cotton tissues; dyed or printed ; knitted goods.

In all these articles there has been a progressive increase, as shown by the following table :—

Articles.	Tons of 1,000 Kilos.		
	1891.	1892.	1893.
White cotton textiles	3,228	5,115	5,551
Ditto, dyed or printed.. ..	1,069	1,419	2,293
Knitted goods	1,045	1,272	1,368

The total value of exports during the 3 years was :—

Year.	Value.	
	Currency.	Sterling.
	Pesetas.	£
1891..	28,019,894	1,120,792
1892..	40,233,239	1,609,328
1893..	48,671,497	1,946,859

the value of white cotton tissues alone having been:—

Year.	Value.	
	Currency.	Sterling.
	Pesetas.	£
1891..	14,526,922	581,076
1892..	23,019,282	920,764
1893..	24,980,159	999,206

The increased exportation of cotton goods is a further evidence of the development of the cotton industry in Catalonia.

Linen, jute, &c. The development of Spanish textile industries is further shown in the returns of exports of manufactures of other vegetable fibres, viz., hemp, flax, jute, &c. (Class 5), the values having increased from 4,057,765 pesetas (162,308*l.*) in 1891 to 6,389,107 pesetas (255,564*l.*) in 1893, the principal increase having been in plain tissues of linen or hemp.

Wool. In the exports of wool and woollen substances (Class 6) there has been a considerable increase, principally in the raw material (unwashed wool), the value of which in 1891 and 1893 was 7,290,304 pesetas (291,612*l.*), and 14,375,641 pesetas (575,024*l.*). There has also been a considerable increase in knitted goods and cloths made of pure wool. In those containing a mixture of cotton there has been some diminution. The development of this branch of trade is shown by H.M.'s Consul in Catalonia to have been very considerable, the exportation of Spanish woollen goods to Mexico and South America having assumed large proportions.

Silk. The exports of silk and silk manufactures have not varied much during the last 3 years, the total value for 1893 having been 4,039,051 pesetas (161,560*l.*). The value of raw silk, the greater part of which has been exported to France, having been 1,958,900 pesetas (78,356*l.*). In the class of plain silk tissues there has been some diminution.

Paper. In the exportation of paper and its appliances (Class 8), which includes books, there has been but little alteration. The total value exported in 1893 was 9,191,869 pesetas (367,672*l.*).

Wood. In the class of wood and similar materials employed in manufactures, cork occupied the principal place, although it shows some diminution, the exportation of corks for bottles having diminished from 24,887,646 pesetas (995,504*l.*) in 1891 to 20,877,324 pesetas (835,092*l.*) in 1893. Of this total, about one-third, representing about 1,088,092 thousand corks were exported to France. The export of esparto grass, the value of which is given as 4,851,748 pesetas (194,068*l.*), is somewhat less than in the 2 preceding years.

Animals. In the class of animals and animal products there has been an increase in the exports during 1893, the total value amounting

to 45,138,928 pesetas (1,805,556*l.*). Among the former there has been a diminution in the exports of horses, cattle, and swine as compared with 1891, although the exports of cattle were larger in 1893 than in 1892. In untanned hides there has been a progressive increase since 1891, which, however, has not been sustained in the class of goatskins. The exports of morocco leather remain about the same. The most remarkable feature in the exports of this class consists in boots and shoes, the value of which amounts to more than half that of the whole class, viz., 26,330,608 pesetas (1,053,224*l.*). Leather. Boots and shoes.

The export of machinery (Class 11) is of but little importance, amounting to 943,139 pesetas (37,724*l.*).

The most important class of exports is, however, that of alimentary substances (Class 12), comprising the produce of Spanish fisheries, cereals, fruits, &c., such as raisins, filberts, oranges, grapes, olive oil, and more especially wine. "Alimentary substances."

With regard to fisheries, the bulk consists of lobsters and shell-fish principally exported to France, and also of sardines. In the former there is a considerable increase as compared with 1892, the value exported in 1893 having been 695,151 pesetas (27,804*l.*). Fisheries.

The sardine fisheries show hardly any alteration as regards the amount exported, which in the 2 years was a little over 1,792,000 pesetas (71,680*l.*).

There was a marked increase in the exports of rice. Rye, however, and wheat show a marked decrease, which is to some extent made up for under the heading of other cereals. Wheat-flour, as might be expected, shows a decrease.

Under the heading of vegetables and garden produce, beans, onions, almonds, and olives show an increase. The export of raisins, however, shows a considerable decrease, the value, which in 1892 had risen to 18,640,589 pesetas (745,623*l.*), having been 13,644,646 pesetas (545,785*l.*). The exports of oranges showed a slight increase over 1892, the value having reached 14,623,606 pesetas (584,944*l.*), representing 91,397 tons of 1,000 kilos. Of these 33,415 tons were exported to France. The export of olive oil showed a considerable increase, the value in 1893 having reached 25,205,359 pesetas (1,008,212*l.*). Vegetables

The exports of wine are divided into three classes:—Common wines; wines from the Jerez district; wines of a higher class, "generoso." Wine.

The countries to which they are exported are given as France, England, the rest of Europe and Africa, Cuba and Porto Rico, America, Asia and Oceania.

EXPORTS of Common Wines during the Years 1891–93.

Country.	Sterling.			Currency.		
	1891.	1892.	1893.	1891.	1892.	1893.
	£	£	£	Pesetas.	Pesetas.	Pesetas.
France	9,909,347	3,869,937	2,636,383	247,733,697	96,748,438	65,909,592
England	108,154	72,337	71,550	2,703,868	1,808,428	1,788,768
Other parts of Europe and Africa	166,222	94,725	140,331	4,155,550	2,368,125	3,508,290
Cuba and Porto Rico	303,477	401,000	441,840	12,586,943	10,024,985	11,046,006
America, North and South	365,042	253,453	306,455	9,126,068	6,336,347	7,661,376
Asia and Oceania	29,295	20,154	24,430	732,389	503,855	610,956
Total	11,081,537	4,711,606	3,620,997	277,038,515	117,790,178	90,524,988

Exports of Sherry and Similar Wines during the Years 1891–93.

Country.	Sterling.			Currency.		
	1891.	1892.	1893.	1891.	1892.	1893.
	£	£	£	Pesetas.	Pesetas.	Pesetas.
France	461,709	290,568	143,184	11,542,735	7,264,200	3,579,000
England	448,645	421,080	343,680	11,216,127	10,527,000	8,592,000
Rest of Europe and Africa	132,539	107,947	78,225	3,313,477	2,698,680	1,955,640
Cuba and Porto Rico	8,282	8,332	3,201	207,063	208,320	80,040
America, North and South	117,279	94,555	129,192	2,931,980	2,363,880	3,229,800
Asia and Oceania	2,744	1,032	504	68,604	25,800	12,600
Total	1,171,198	923,514	697,986	29,279,986	23,087,880	17,449,680

EXPORTS of Superior Wines, "Generoso," during the Years 1891–93.

Country.	Sterling.			Currency.		
	1891.	1892.	1893.	1891.	1892	1893.
	£	£	£	Pesetas.	Pesetas	Pesetas
France	112,062	54,743	48,920	2,801,557	1,368,585	1,223,235
England	7,734	479	486	193,364	11,985	12,155
Rest of Europe and Africa	17,594	5,939	10,217	439,859	148,495	255,425
Cuba and Porto Rico	3,154	4,243	3,396	78,856	106,080	84,915
America, North and South	15,843	11,114	22,224	396,091	277,865	555,560
Asia and Oceania	638	1,870	550	15,968	46,750	13,770
Total	157,025	78,388	85,802	3,925,695	1,959,760	2,145,060

The returns show that the amount of common Spanish wine exported to France has diminished very considerably, which is readily accounted for by the disappearance of phylloxera, and the consequently large vintages during the last few years having rendered French wine growers independent of a supplementary supply from Spain, and also by the higher duties now imposed in France on Spanish wines.

Wines of this class have never been very extensively imported into England, and the returns for last year show a further falling-off. As is well known, the Spanish Government wish to promote a demand for this class of wine in the English market, having a conviction that they only require to be known to be appreciated, and that a readjustment of the wine duties would enable them to compete on equal terms with the low priced wines of France. From a previous study of the same question in Portugal it would appear that the red wines of the Peninsula, with the notable exception of port, have hitherto only met with a ready sale in England after a preparation which it also appears can only be effectually carried out in France.

There has been a slight increase in the exports of the better class of Spanish wines, mainly in consequence of a demand from the United States and South America.

Diminished exports of sherry.

According to a statement made some years ago by a Spanish authority, the stagnation in the wine trade at Jerez was owing to a deterioration in the quality of wine caused by an undue admixture of spirit, a charge which had been already made by British scientific experts who had studied the question. This form of adulteration was at that time facilitated by the large importation of German potato spirit.

Without venturing to express an opinion on a highly controversial topic, it may be stated that wine growers contend that except in the case of high class wines which can only be sold at a corresponding price, a certain amount of preparation has hitherto been found necessary in order to counteract the acetous fermentation to which the wines are subject at a certain stage of their development and to enable them to support a sea voyage.

The extensive importation of German alcohol which formerly prevailed encouraged this form of adulteration, but now that it has ceased in consequence of the high duty imposed by the present tariff, much of the inferior wine formerly exported has become worthless, except for distilling purposes, as the expense of fortifying it with brandy would render its sale unremunerative.

It would, therefore, appear that only wines of the better class can now be exported at a profit, a surmise which receives the support of the British Vice-Consul at Jerez, who reported last year that at no time in the annals of the trade had sherry of a better quality been shipped.

If this is the case, the cause of the decrease in the demand for sherry must be looked for elsewhere than in the deterioration in its quality, possibly in a change of fashion which no longer

requires alcoholic strength in a wine intended rather as a popular beverage than as a luxury.

In the case of sherry as also in the class of wines described as "generoso," the satisfactory point noticeable is the increased demand for transatlantic markets.

In connection with this subject the following remarks of the Madrid Chamber of Commerce are of interest, although they refer to a period when the exportation of wine to France was greater than at present. They recommend that the attention of wine growers should be directed to the quality rather than the quantity of the wine produced, by means of improved processes of wine making, and more especially by studying the tastes and requirements of the markets for which the wines are destined. A recommendation which is stated to have been effectually carried out by wine-growers of the Rioja district.

A distinction is drawn between wines exported for home consumption, *i.e.*, the country of destination, and wines of commerce. England being the principal importer of the former, and France of the latter, which country has hitherto been obliged to use Spanish and Italian wines for "Coupage" in order to make up the quantity necessary for her own requirements and for exportation.

The average amount of wine grown in France is stated to have been 30,000,000 hectolitres* (660,000,000 gallons) in round numbers; the amount required annually for consumption, including exportation, amounted to 50,000,000 hectolitres (1,100,000,000 gallons); the difference of 20,000,000 hectolitres (440,000,000 gallons) having to be provided for by foreign countries, *i.e.*, Spain and Italy, the produce of Algerian vineyards being as yet insufficient, much of the inferior French wines, moreover, requiring a mixture with wine of a fuller body.

In this connection the advantage is noted which would accrue to Spain if French wines were admitted in order to undergo the necessary treatment and exported to foreign countries as Spanish instead of French wines. Light is incidentally thrown on the reasons for which Spanish must has sometimes been rejected at the French frontier, namely, an undue admixture of alcohol, of colouring matter, or of sulphate of potassium, which might be guarded against by a competent analysis at the ports of departure or of arrival.

Miscellaneous exports.

Class 13 of the tariff comprises miscellaneous articles, such as fans, lucifer matches, and playing cards, of which the total amount exported in 1893 is valued at 2,538,691 pesetas (101,547*l.*).

Shipping statistics.

The following table shows the number and tonnage of Spanish and foreign ships, the nationality of which is unfortunately not given, which entered and cleared from Spanish ports during 1891, 1892, and 1893, laden or in ballast, together with the aggregate amount of their cargoes :—

* A hectolitre is here taken as 22 gallons.

TABLE showing the Number and Tonnage of Spanish and Foreign Vessels Entered at Spanish Ports Laden or in Ballast during the Years 1891–93.

	1891.			1892.			1893.		
	Number of Vessels.	Tonnage.	Cargoes (in Tons of 1,000 Kilos.).	Number of Vessels.	Tonnage.	Cargoes (in Tons of 1,000 Kilos.).	Number of Vessels.	Tonnage.	Cargoes (in Tons of 1,000 Kilos.).
LADEN.									
Steamships—									
Spanish	5,339	4,268,972	725,880	4,749	4,029,908	758,633	5,194	4,679,083	1,114,852
Foreign	4,720	3,314,250	2,229,145	3,898	2,941,026	2,153,562	5,975	4,901,970	4,531,324
Sailing ships—									
Spanish	2,018	162,663	128,492	1,513	125,919	107,076	1,304	124,545	100,917
Foreign	1,738	372,500	396,100	1,340	274,490	299,108	935	204,523	226,540
IN BALLAST.									
Steamships—									
Spanish	1,040	718,785	..	1,176	849,095	..	954	625,091	..
Foreign	3,013	2,696,879	..	3,476	3,100,752	..	811	769,525	..
Sailing ships—									
Spanish	640	30,142	..	596	33,869	..	588	46,550	..
Foreign	824	174,233	..	594	140,571	..	438	98,911	..
Total .. .	19,332	11,738,414	3,479,617	17,342	11,495,630	3,318,379	16,199	11,450,198	5,973,633

TABLE showing the Number and Tonnage of Spanish and Foreign Vessels Cleared from Spanish Ports Laden or in Ballast during the Years 1891–93.

	1891.			1892.			1893.		
	Number of Vessels.	Tonnage.	Cargoes (in Tons of 1,000 Kilos.).	Number of Vessels.	Tonnage.	Cargoes (in Tons of 1,000 Kilos.).	Number of Vessels.	Tonnage.	Cargoes (in Tons of 1,000 Kilos.).
LADEN.									
Steamships—									
Spanish	5,116	4,520,322	1,272,955	4,798	4,554,088	1,143,613	5,258	4,754,033	1,162,980
Foreign	7,604	5,604,985	6,358,094	7,104	5,380,810	6,185,641	6,188	5,092,480	4,769,089
Sailing ships—									
Spanish	1,405	169,441	149,549	1,268	131,799	101,068	1,265	125,662	103,265
Foreign	1,109	239,345	272,245	861	190,734	230,098	873	186,712	208,752
IN BALLAST.									
Steamships—									
Spanish	726	365,407	..	786	569,371	..	860	535,064	..
Foreign	506	463,076	..	454	409,339	..	564	544,263	..
Sailing ships—									
Spanish	840	49,983	..	659	35,225	..	611	56,167	..
Foreign	864	194,825	..	521	124,663	..	470	119,670	..
Total	18,169	11,607,387	8,052,843	16,451	11,396,028	7,660,420	16,089	11,414,057	6,244,086

APPENDIX.

Although they may not accurately represent the actual state of the textile industry since the recent stimulus given to the home trade by a protectionist tariff, the following figures taken from a report recently published by the Madrid Chamber of Commerce may be of interest.

According to this authority, the cotton industry in 1890 was carried on by 1,124 manufacturers, who pay in industrial tax 621,864 pesetas (24,874*l.*), the machinery used being 22,188 looms of all descriptions and 715,539 spindles. The cotton industry, according to the amount paid in taxes, represents rather more than half the entire amount contributed by the textile industries.

The following statistics taken from the same source relate to the manufacture of woollens. The number of manufacturers in 1890 was 3,253, the amount contributed by them in taxes being 226,760 pesetas (9,070*l.*). The machinery employed was as follows :—

Description.	Number.
Spindles worked by water or steam	232,014
,, ,, horse-power	4,300
Hand-looms	7,690
,, paying lesser duty	22,350
Looms (Jacquard)	1,334
,, mechanical	1,189
Machines with shuttles	1,986
,, (Jacquard)	719
Hand-looms for carpets	110
,, tapestry	86
Steam-fulling machines	142
Fulling machines worked by water-power	308
,, ,, horse-power	51
Cloth-racks	454
Machines for shearing cloth (tundosas)	334
,, tearing cloth (deshilachadores)	98

The total consumption of wool during 1891 is calculated at 17,811,138 kilos., made up as follows :—

Description.	Quantity.
	Kilos.
42,500,000 kilos. of unwashed native wool, calculated after cleansing to yield 42 per cent.	17,880,000
402,154 kilos. unwashed foreign wool imported, allowing 42 per cent. at the same computation	168,904
Washed foreign wool imported	1,650,054
Total	19,698,958
Deducting amount exported	1,887,820
Grand total	17,811,138

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DIPLOMATIC AND CONSULAR REPORTS ON TRADE AND FINANCE.

SPAIN.

REPORT FOR THE YEAR 1893

ON THE

TRADE AND SANITARY CONDITION OF THE CANARY ISLANDS.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1296.

Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1894.

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SPAIN.

TENERIFFE.

Captain Harford to the Earl of Kimberley.

My Lord, *Teneriffe, March* 30, 1894.

I HAVE the honour to forward to your Lordship herewith enclosed the Annual Report on the Commerce and Trade of the Canary Islands during the past year.

I have, &c.

(Signed) S. H. HARFORD.

Report on the Trade and Commerce of the Canary Islands for the Year 1893.

ABSTRACT of Contents.

	PAGE
Shipping and general review	1
Trade and commerce	2
Industry and enterprise..	2
Public works	2
The cholera	2
Annexes—	
Cholera cases in 1893..	4

General Review of Trade.

General review of trade.

Although the trade of the islands suffered during the winter from the quarantine of Teneriffe, commercial prospects are generally regarded as satisfactory.

Shipping.

The increase in shipping continues.

Harbour works.

These, both in Teneriffe and Grand Canary, progress steadily.

Trade and Commerce.

Exports and imports.

On these topics I have nothing new to report. The area of cultivated land extends rapidly. Tomatoes, potatoes, and bananas still continue the principal articles of export, and I hear of nothing new in the import trade.

Industry and Enterprise.

Industry and enterprise.

No new industries.

Public Works.

Roads.

Both in Teneriffe and Grand Canary progress in road-making continues.

Electric lighting.

The lighting of the town of Santa Cruz, in the island of Palma, with the electric light has proved a very successful undertaking, and it will probably be adopted at once at Orotava in this island. The Taoro Grand Hotel has already been fitted with the wires, lamps, &c.

The Cholera.

Cholera epidemic in Teneriffe.

In the month of October, for the first time in the history of Teneriffe, cholera of the Asiatic type made its appearance at Santa Cruz, and naturally in an island so celebrated for its immunity from all kinds of disease, created a panic, which, spreading to the other towns and villages in the island, induced the authorities to take energetic precautions against any intercourse with us.

To justify these precautions the most absurd reports regarding the epidemic were spread, and a letter published in the "Times" of December 16, purporting to have been written from Orotava by a British subject, is calculated so seriously to injure the prospects of Teneriffe as a winter resort for invalids that I take this opportunity of saying that it has been repudiated by nearly every English visitor and resident in that district, and if really originating there, should not have been published without some official verification of its startling assertions.

Intending visitors may rest assured that there is no truth whatever in the statements. We had no dead carts parading the streets. no dead body was ever seen on any road in town or country, no corpse was ever left unburied, and no Governor was stoned.

In Santa Cruz, as in all towns, we have undertakers with their hearses, catafalques, &c., for hire, and there is besides a closed parish hearse, which was frequently in use during the sickness. In slang language perhaps all these may be termed dead carts. There was also on one occasion a body found lying

in the gutter on the Marino, which caused a little excitement till it turned out to be a well-known character in a state of happy unconsciousness.

In St. Andres there were several cases that had to be interred by the parish authorities, in consequence of their having no relatives, or none that could be found.

The origin of the outbreak is generally attributed to the arrival, in the early part of October, of a steamer from Rio, which had suffered severely from cholera on the voyage. This steamer, though closely quarantined, is supposed by some to have evaded the restrictions. It appears to be an acknowledged fact that two women whose relatives were employed in coaling the vessel were the first victims; but the possibility of the steamer having had any connection with the shore is so strongly denied by those who ought to know best that I am more inclined to attribute it to the abnormal state of the atmosphere in the autumn, and to the contamination of the water supply.

The unrivalled climate of the Canary Islands is undoubtedly due in a great measure to the prevalence throughout the year of the north-east trade wind. This quite deserted us last autumn; the latter part of October and the month of November being marked by unusually hot weather, without a breath of wind. Consequently the fermentation from the drains, cesspools, &c., in the town caused by the rains which commence at this period was not, as usual, blown away, and the conditions of the atmosphere became only too favourable for the development of disease.

The water from springs in the mountains is of excellent quality, but it has hitherto been conducted into the cisterns of the houses through stone canals. These in the upper part of the town are frequently broken open, and street sewage consequently gets into them. This is now to be altered, and iron piping substituted.

The annexed return of every death from cholera is from the registrar's department, and I place the mortality only against the population of Santa Cruz, though, strictly speaking, as cases occurred both to the south and north of the capital, I might place it against the population of the island.

Regarding the loss, however, as confined to our population, considering that about 40 per cent. of the deaths were infants and old people, and that the sickness only attacked a certain class living in localities and under conditions which, in any other climate, would render cholera endemic. I do not think invalids or visitors need take the late epidemic even into consideration.

The district of Orotava on the western side of the island had not a single case, which they naturally attribute to their extraordinary precautions, and when it is remembered that no epidemic has been known in Teneriffe since the yellow fever in 1811, that the peasantry are exceedingly careless in their habits, that cholera was to them an unknown disease, and their belief in

the silly falsehoods spread concerning the epidemic, these precautions can hardly be wondered at.

Grand Canary and all the other islands also escaped.

	Number of Deaths.	Total.	Children under 20	Adults over 70
Santa Cruz { Lazareto	67	371	4	11
Regla* ..	22		1	2
Town ..	282		67	40
San Andres (a village 5 miles north of Santa Cruz)	40	40	9	8
Total ..	411	411	81	61

* Regla is a small church which was turned into a lazareto.

These may be divided as under :—

Description.	Number.
Males	187
Females	224
Total	411

Number of cases entered at—

	Number.
Lazareto	189
Regla	60
Total	249
Deaths	89
Discharged cured from Lazareto and Regla	160
Total	249

Duration of epidemic, October 15 to December 17, 1893

Population of Santa Cruz returned as 23,000 in 1889.

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SPAIN.

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ON THE

TRADE, &c., OF THE DISTRICT OF THE CONSULATE-GENERAL AT HAVANA.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1213.

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SPAIN.

HAVANA.

Consul-General Gollan to the Earl of Kimberley.

My Lord, *Havana, March* 31, 1894.

I HAVE the honour to transmit to your Lordship a Commercial Report on this Consular District (excepting Santiago de Cuba, which will, doubtless, be reported upon by Mr. Consul Ramsden direct) for the past year. The Report has been drawn up with great care by Mr. Vice-Consul Harrison, and although, unfortunately, through the continued absence of official statistical information, it has not been possible to include any Returns in regard to Imports, Mr. Harrison's remarks on the present condition of the Island; on the increasing Railway development; the growth and cultivation of the Tobacco Plant; and the process of sugar cultivation will, I think, be found particularly interesting.

Business men here are at the present moment in a state of considerable doubt as to the future. The discussion now going on in the American Senate as to the abolition or modification of the McKinley tariff; the probable abrogation of the Reciprocity Treaty with America; and the threatened overhauling of the Spanish tariff by the Madrid authorities are all elements of uncertainty, while the financial condition of Spain and its Dependencies, including Cuba, is very far from being healthy or encouraging. But the surprising fertility of the soil in this Island is the sheet-anchor to which cultivators and speculators still trust and, as the outlook for trade generally in all countries seems to show distinct signs of improvement, hopes are entertained that the state of crisis which at present exists will soon disappear.

I have, &c.,

(Signed) ALEX. GOLLAN.

Report on the Trade and Commerce of the Consular District of Havana for the Year 1893.

Abstract of Contents.

PAGE

Havana—
Trade and commerce—
General review 3
Production of sugar 4
Distribution of sugar 4
Export of tobacco 6
Molasses 6
Beeswax 6
Honey 6
Rum 6
Cuban woods 7
Fruits 7
Imports 7
Shipping and navigation—
British shipping 7
Canadian shipping 8
Harbour arrangements 10
Foreign shipping 10
Population and industries—
Tobacco cultivation 10
Cigar manufactories 11
Sugar cultivation 11
,, manufacture 11
Fibres 12
Employment of women 12
Public health 12
Public works—
Railways 13
Tramways, &c. 14
Telegraph, cables, telephone, &c. 15
General remarks—
Population 15
Government of the island 16
Schools 17
Banks 18
Fire brigades 18
Matanzas—
Condition of trade 18
Financial difficulties 19
Banks 19
Public works, bridges, &c. 20
British shipping 20
Imports 20
Exports 21
Cardenas—
Sugar prospects 22
Harbour 22
Coal importation 22
British shipping 22
Imports 22
Exports 23
Sagua la Grande—
General condition 23
Nuevitas—
Financial difficulties 24
Railways 24
Productions of district 24
Mines, &c. 24
Shipping 25

ABSTRACT of Contents—continued.

	PAGE
Cienfuegos—	
Trade and commerce	25
Imports	26
Shipping and navigation	26
Public health	29
„ works	29
General remarks	29
Agriculture	29
Return of exports	29

HAVANA.

General review.

The year 1893 has been an unfortunate one for Cuba. The two principal industries, sugar and tobacco, on the success of which the prosperity of the island depends, have both failed to fulfil expectations.

In the previous year the production of sugar had reached the total of 976,895 tons, prices had been firm and remunerative, and the small quantity of 15,000 bags remained unsold. There seemed to be every promise that 1893 would be equally satisfactory, but the total production of sugar shows a falling off of 160,789 tons, and prices during the last 6 months have ruled so low that there remained 200,000 bags unsold at the end of the year.

The failure of the crop must have been very disappointing to planters, as large quantities of machinery are imported yearly at a cost that must seriously affect the profits of sugar manufacture. However, as 1892 had been an exceptionally good year, it could not be reasonably expected that the output would be maintained, and the failure of the crop was, from natural causes, common to all the agricultural products of the island. In considering the fall in prices, the enormous increase in the production of beetroot sugar in all parts of the world must be taken into account; 400,000 tons are said to have been produced in excess of the previous year, and this had its corresponding influence on the price of cane sugar. But the principal reason is that the United States are practically the only market for Cuban sugar. This market is ruled by a Company called the "Sugar Trust," which from its large capital is able to a great extent to govern the supply and demand.

In the beginning of the year 1893, many merchants hoping for higher prices held their sugar. In the meantime the monetary crisis in the United States began to be felt, the demand for sugar decreased, and prices receded. Many merchants hoping for improvement still declined to sell, but had eventually to part with their sugar at disastrous prices to meet their liabilities.

The crisis then spread to the banks and commercial houses which had lent money on the crop. The Banco de Commercio (Commercial Bank) was unable to stand the strain and was obliged

temporarily to suspend payment, and the Banco Español (Spanish Bank) and many well-known firms suffered severely.

With regard to tobacco, the year was not as prosperous as could have been wished, although the monetary crisis cannot be held responsible for the failure, which was caused by the unsatisfactory condition of some of the Spanish commercial treaties. The crop itself during the last year has fallen off considerably both in quality and quantity, the published figures given below showing a considerable deficit against 1893.

In fact, the unfortunate economic condition of Cuba is felt in all its industries, and were it not for the marvellous natural agricultural wealth of the country, industry would be paralyzed. As it is, a good year brings immediate wealth to the island, and difficulties which seem to be hopeless are smoothed over, thanks to a soil rich enough to produce sugar without labour and the finest tobacco in the world.

I cannot vouch for the absolute accuracy of the figures in the following tables, but they have been made up with care and may be considered fairly correct.

TABLE showing Production of Sugar in the Island of Cuba during the Years 1892–93, compared with 1891–92.

Years.	Quantity.
	Tons.
1891–92	976,789
1892–93	815,894
Deficit, 1892–93	160,895

TABLE showing Distribution of Sugar Exported during the Year 1893.

Country.	Quantity.
	Tons.
United States of America..	680,642
Canada	25,069
Spain	9,448
England	3,045
Total	718,204

TABLE showing Amount of Tobacco Exported from the Island of Cuba during the Year 1893, compared with 1892.

TOBACCO.

Year.	Quantity.
	Bales.
1892..	241,291
1893..	227,865
Deficit, 1893	13,426

MANUFACTURED CIGARS.

Year.	Quantity.
	Number.
In 1892	154,931,133
1893	147,365,000
Deficit, 1893	7,566,133

CIGARETTES.

Year.	Quantity.
	Packets.
In 1892	38,877,036
1893	39,581,493
Increase, 1893	704,457

SCRAPS.

Year.	Quantity.
	Kilos.
In 1892	304,104
1893	371,232
Increase, 1893	67,128

TABLE showing Distribution of Tobacco Exported during the Year 1893.

Country.	Quantity.			
	Cigars.	Tobacco.	Cigarettes.	Scraps.
	Number.	Bales.	Packets.	Kilos.
United Kingdom ..	30,668,000	929	1,470	..
Germany	21,857,000	28,847	35,430	2,945
France	11,080,000	3,832	632,442	27,737
Spain	12,118,000	39,599	5,988,741	33,033
United States	67,492,000	153,314	6,497,575	60,423
Southern and Central America	2,544,000	209	5,716,756	244,618
Other countries ..	1,606,000	1,135	20,709,079	2,476
Total	147,365,000	227,865	39,581,493	371,232

Molasses.

There were 7,654 hogsheads of molasses exported during the year, being 17 hogsheads more than during the preceding year. The whole quantity, with the exception of 18 hogsheads, was sent to the United States. By a new process a great deal of the molasses produced is now manufactured into sugar.

Beeswax.

There was an increase of 105 cwts. in the amount of beeswax exported this year as compared with 1892; the total quantity being 2,934 cwts. Of this 1,384 cwts. was exported to the United States and 1,178 cwts. to Spain. The price ranges from 4*l.* 5*s.* to 5*l.* 12*s.* per cwt. according to quality.

Honey.

1,672 barrels (tercecolas) of honey were exported during the year.

775 barrels to the United States; 722 barrels to Germany. The small quantity remaining over was exported to France, Spain, and Holland. The price quoted is 1*s.* 3*d.* per gallon exclusive of cask.

Rum.

9,308 pipes of rum were exported against 21,241 pipes in 1892.

Their distribution was as follows:—

To—	Quantity.	
	1893.	1892.
	Pipes.	Pipes.
United Kingdom	51	221
Germany	442	..
France	1,240	1,734
Spain	3,623	17,103
Morocco	1,040	..
United States	111	162
South and Central America ..	2,756	1,972
Other countries	45	49
Total	9,308	21,241

It will be seen that the great falling off was in the quantity exported to Spain, caused by the heavy import duty exacted, against which the producers have hitherto protested in vain. The prices quoted are :—

	Prices.	
	From—	To—
	£ s.	£ s.
Per pipe for $\frac{24}{25}$ proof in chesnut cask	3 10	3 15
For same in oak cask	4 15	5 0
For 30 degrees in oak cask ..	7 0	7

Prices for rare woods for full cargoes of assorted sizes and deliverable free on board on the southern coast of Cuba are as follows :— Cuban woods.

Description.		Prices.	
		From—	To—
		£ s.	£ s.
Cedar	Per 100 feet ..	..	9 5
Mahogany	„ ..	..	12 0
Cocus wood	Per ton ..	3 0	4 0
Dyewood	„ ..	..	4 5

All tropical fruits are grown in Cuba, and a large export to the United States is carried on in pineapples, bananas, oranges and cocoanuts. Fruits.

It has often been stated in these annual reports that it is impossible to obtain any correct account of the imports into Havana. This year is no exception to the rule. I have found it hopeless to obtain any reliable information on this important branch of trade. Imports.

Shipping and Navigation.

During the year 219 British vessels entered the port of Havana. These consisted of 150 steamers and 69 Canadian sailing vessels, making in all five less than during the preceding year. British shipping.

The tonnage, however, is considerably greater, being an increase of 14,596 tons, and the value of the cargoes, as entered in the "Consular Register," shows an improvement of 581,811*l.* Only 16 British steamers brought cargo direct from home during the year, 12 of the number being from Cardiff with coal. The other

steamers were employed in the carrying trade, of which 126 arrived from ports in the United States, the greater number having brought coal from Baltimore and Philadelphia.

Canadian shipping

The Canadian sailing ships coming to this port usually leave home in the autumn with cargoes of potatoes, fish, and lumber, and spend the winter months trading between Cuba and the United States with lumber and sugar, returning north again before the summer. The Canadian crews give very little trouble in this port; they are usually well known to the master of the ship, and often have their homes in the same neighbourhood.

During the year no British ship cleared direct for Great Britain.

The following is a complete list of the British shipping at this port during the year :—

RETURN of British Shipping at the Port of Havana in the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.								Cleared.							
Total Number of Vessels.			Total Tonnage.			Total Number of Crews.	Total Value of Cargoes.	Total Number of Vessels.			Total Tonnage.			Total Number of Crews.	Total Value of Cargoes.
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.			With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		
							£								£
60	1	61	37,969	22	37,991	956	92,070	1	15	16	677	3,785	4,462	290	1,000

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.								Cleared.							
Countries whence Arrived.	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.	Countries to which Departed.	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.
	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.				With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		
								£									£
United States ...	120	6	126	115,008	8,322	123,330	2,506	256,839	Cuban ports ...	45	57	102	38,850	65,122	103,972	2,316	56,640
Cuban ports ...	11	5	16	14,587	5,263	19,850	390	108,000	United States ...	26	64	90	26,981	39,688	66,669	1,453	412,300
Belgium	12	...	12	16,947	...	16,947	294	847,000	Mexico	3	4	7	3,292	4,403	7,695	158	5,000
Mexico	1	2	3	1,844	3,569	5,413	81	1,303	Haïti	...	1	1	...	549	549	19	...
Porto Rico ...	...	1	1	...	1,232	1,232	24	...									
Total	144	14	158	148,386	18,386	166,772	3,295	1,213,142	Total	74	126	200	69,123	109,762	178,885	3,946	473,940

Port charges. Pilotage.

There are no port charges or harbour dues in Havana, with the exception of the charge for pilotage. It is necessary for all vessels to take a pilot both on entering and leaving the port. The charges are ruled according to the tonnage of the vessel, and after sun-down the price is doubled.

Wharves.

Most of the wharves belong to Government, and for using these a charge is made at the custom-house for loading and unloading, as well as a small payment for the erection of a landing-stage.

There are numerous private wharves, where, of course, special regulations are made.

Dry dock.

The floating dry dock in this port has been condemned as unsafe for several years, and cannot be used. Vessels are, however, allowed to be docked in the Government Arsenal dry dock, but the charges are so high that masters of vessels prefer, if possible, to reach a port in the United States to do their repairs.

Manifests.

There is a fine of 500 dol. imposed on all ships, whether in ballast or with cargo, which arrive without a manifest correctly stating full particulars and endorsed by the proper authorities. Owing to frequent disputes, it is well to note that the fine is always insisted upon, and that all protests and excuses are invariably useless and a waste of time and money, unless some very clear explanation can be given.

Quarantine.

Passengers from Cuba are, as a rule, put under 5 days' quarantine in all ports in the United States, between the months of May and October. During those months all passengers have to present a certificate of health from a doctor in Havana, who is appointed by the United States Government.

Lloyd's agent in Havana.

Mr. Aquilar Ordoñez has lately been appointed Lloyd's agent in Havana.

The following return gives the number, description, and tonnage of the foreign ships that entered this port during the year:—

RETURN of Foreign Shipping in the Port of Havana during the Year 1893.

Nationality.	Steamers.	Barques.	[illegible]	Schooners.	Total.	Tonnage.
American	392	31	18	115	556	631,958
Spanish	327	59	29	4	419	666,601
French	32	1	...	...	33	78,590
German	32	1	...	...	33	45,685
Danish	1	...	...	...	1	159
Norwegian	35	9	1	...	45	25,345
Italian	...	6	3	...	9	4,470
[illegible]	...	...	...	1	1	374
Total	819	107	51	120	1,098	1,453,182

Population and Industries.

Tobacco cultivation.

Pinar del Rio, the western province of Cuba, is given up almost entirely to the cultivation of tobacco. The plantations

are scattered about in all directions, generally a mile or two apart They consist of a number of small fields ("vegas") of about 10 acres each, selected wherever the land is richest. The rest of the land is entirely uncultivated. The tobacco seed is sown in nurseries, about 10 lbs. being used per acre.

Treatment of plants.

In October and November the young plants, when about 3 inches high, are bedded out in the tobacco fields, in furrows 2 feet apart. During the 3 months the plants take to reach their full size, the greatest care is taken of them. Each plant is constantly examined, the green tobacco caterpillars killed, and the furrows kept perfectly clean with the plough. When the plant has grown its big leaves, generally about ten in number, all the small leaves are picked off the stalk, and on reaching its full height the head of the plant is also picked off. This allows the leaves to expand and spread out in the sun. The female plant gives the best leaves for capas (the outside wrapper of a cigar) as the leaves are larger and stronger. The colour of the leaf is bright green until ready for picking when it begins to turn yellow and spotty.

Method of gathering.

Drying.

They are then gathered by cutting the stalk in such a manner that two leaves remain on each piece of stalk. The leaves are then strung over thin poles in the drying houses, one leaf each side of the pole, and left to dry about 5 weeks. The drying houses are large airy barns, thatched with palm leaves, the inside being arranged with rows of poles one above another. On being taken down the leaves are put together in bundles of about 100 leaves, which are made into bales of usually 80 bundles and wrapped up in palm leaves.

Packing.

The bales are then ready for sale and are taken in this state to the storing rooms of the cigar manufactories in Havana.

Cigar manufactories.

There are 119 first class cigar manufactories in Havana.

Many of the large manufactories employ upwards of 400 men. No women are employed in cigar rolling although a few wash and prepare the leaves.

The wages are according to skill. A good roller of cigars can earn upwards of 1*l.* per day.

Sugar plantations.

There are 577 sugar plantations in Cuba. A large number of them are splendidly fitted up, no expense is spared on the machinery employed, and electric light is used in all parts of the premises, so work can be carried on continuously day and night.

Sugar-cane.

The cane, owing to the natural qualities of the soil, needs but little care, and the same plants can be cut down from 5 to 7 years in succession without renewal.

Nearly all the plantations have railways connecting them with one or other of the main lines running to the different ports.

Sugar machinery.

The machinery has reached such a state of perfection that labour is reduced to a minimum, the few men employed at the furnaces, cooling tanks and centrifugal machines being usually Chinese, who are better able to withstand the extreme heat, with, of course, skilled overseers to superintend the work.

Process of manufacture.

The cane having been roughly cut down in the fields by men and women with long knives, called matchetes, is brought to the

manufactory by railway or bullock carts. It is then thrown on to a platform, which is moved by machinery, and carries it to the crushing-rollers, usually three in succession where the juice drips down into troughs, and is carried off to the boilers. The husk, which, under recent improvements in the machinery used, now provides sufficient fuel for the whole operation of sugar making, is taken by another rolling platform to the furnaces. From the boilers the juice is run into tanks to cool off. It is then passed through the triple-effect and centrifugal machines, and comes from the latter in its completed form of sugar ready for exportation, and is at once put into sacks and sent down to the ports. The molasses is transferred in barrels to the rum and alcohol distilleries.

Sugar refineries.

Very little sugar is at present refined in Cuba. The proposed removal of the duty on refined sugar in the United States would make an important change in this respect, and consequently much anxiety is felt here on the subject. If the duty were taken off it is probable that refineries would be put up in all parts of the island, although the doubtful duration of the reform might prevent many from going to so great an expense.

Fibre.

There is no reason why the manufacture of fibre might not be carried on as successfully in Cuba as it is in Mexico and many West Indian islands.

Henequen.

Henequen grows in great abundance, and is said to be of excellent quality, the leaf being larger and the fibre made from it finer and more silky than from Mexican henequen. I am told that the plants last 12 years, and that 28 leaves can be picked from each yearly, the leaves being from 5 feet to 9 feet long, and weighing from 4 lbs. to 7 lbs.

Ramie.

I believe that no ramie is grown in this island for commercial purposes.

Ice manufactories.

There are three ice manufactories in Havana, the result being that ice is plentiful and cheap.

Beer.

All kinds of English, American, and German beer are imported, but there is also a large brewery here called "La Tropical."

Employment of women.

In Havana there are very few employments in which women take part. There are no saleswomen in the shops or restaurants. Laundry work, dressmaking, and domestic service are their sole employments, and a few of the very poor clean and prepare the leaves in tobacco manufactories. In the country women assist in all kinds of agricultural labour.

Public Health.

Death-rate.

The death-rate of Havana in the year 1895 was 33·3 per 1,000. The total number of deaths amounted to 6,610 persons of the following nationalities:—

Nationality.	Number of Deaths.
Cuban	4,095
Spanish	1,773
African	222
Other countries	520
Total	6,610

It is noteworthy that of the total number of deaths 1,312 persons are said to have died of consumption. Consumption.

Yellow fever was unusually severe. During the six summer months 26·8 per cent. of the entire mortality was due to that cause, the total number of deaths being 645. It was noticed, however, that among the British sailors there were but few deaths, although large numbers were sent to the hospital with the disease, and fortunately recovered. Yellow fever.

There were 4,175 births in Havana during the year. Births.

Of the 3,423 white children born 916 were illegitimate.

Comparing the general mortality with the total number of births there is a result of 2,435 against the population.

There were 945 marriages in Havana during the year. Marriages.

The above figures refer to the city of Havana alone and do not include the numerous suburbs.

Public Works.

Much progress has been made of late years in opening up the country and developing its agricultural resources with railroads. Railways.

There are now upwards of 1,000 miles of main line belonging to the railway companies, and all the larger sugar estates have private lines connecting them with the main lines.

There are ten railway companies in Cuba, the most important being the "Ferro Carriles Unidos." Ten railway companies.

The "Ferro Carriles Unidos" Company have four lines connecting Havana respectively with Matanzas, Batabano, Union, and Guanajay. These lines pass through the most populated part of the country and connect Havana with the other lines on this part of Cuba. "Ferro Carriles Unidos."

The Western Railway was commenced about 40 years ago, and in 1891, the year when it was acquired by an English company, had reached Puerte de Golpe, a distance of 96 miles from Havana and 10 miles from Pinar del Rio, the capital of the province of that name and place of residence of the authorities, as well as being the centre of the tobacco-growing district. The line was at this time in very bad order. The Western Railway.

The new company lost no time in beginning the extension, and great exertions have successfully been made to reach Pinar del Rio this spring. It is hoped that the extension will be opened to the public in April. Extension.

Improvements.

Great improvements have also been made in the old part of the line. Many of the bridges have been replaced by modern steel ones, and a great part of the rails has been entirely renewed. New and comfortable carriages have been put on the line and the daily trains run with punctuality.

Importance to Pinar del Rio.

There is no doubt that the extension of the line will be of the greatest importance to the Western province of Cuba, opening up the rich tobacco district of Vuelta Abajo and bringing into touch some of the finest land in the island, which has as yet been retarded by want of easy communication with the ports. There is already talk of extending the line further westward.

Names of railway companies.

The other railway companies are as follows :—

"Ferro Carriles Cardenas–Jacaro."—The main line of which joins the towns of Cardenas and Santa Clara.

"Ferro Carril de Matanzas."—Having lines between Matanzas and Murga, and also between Matanzas and Guareiras.

"Ferro Carril de Sagua la Grande."—Running between Concha and Cruces.

"Ferro Carril Cienfuegos–Santa Clara."—Connecting these towns.

"Ferro Carriles Unidos de Caibarien."—From Caibarien to Placetas.

"Ferro Carril de Puerto Principe–Nuevitas."

"Ferro Carril de Guantanamo."

Marianao Railway.

"Ferro Carril de Marianao" (the Marianao Railway) also belongs to an English company, with their headquarters in London, the whole of the stock, including debentures, being in English hands. The original line was opened to the public in 1863, and belonged to a Cuban company, but having got into difficulties they liquidated and transferred their interests to the present proprietors.

The line is only 8½ miles in length, and runs between Havana and Marianao, with a branch line to a small village on the coast, which was opened to the public in 1883. During the last year over 750,000 passengers were carried, passenger traffic being the principal source of revenue. The carriages are of the American type, and are fitted, as well as the locomotives, with the Westinghouse automatic air brake; the rails are of steel, weighing 60 lbs. per yard.

Tramways.

The tramways in Havana and the suburbs are owned by one company, the "Ferro Carril Urbanö," which holds certain concessions from Government. The tramways consist of 1 steam-tram from Havana to Vedado, a suburb on the sea-coast about 3 miles away, and 3 lines of horse-trams (1) to Cerro, (2) Jesus del Monte, (3) Castillo del Principe. The carriages are clean and comfortable, and run with punctuality at regular hours.

The fare is 2½*d.* or 5*d.*, according to distance.

Electric tram.

Arrangements are said to have been completed by an English company for laying down the lines of an electric tramway. The projected line covers about 20 miles in all, and is to connect the principal wharves and thoroughfares with the existing tram lines.

It is hoped that the work will begin this spring.

Omnibus. There are numerous lines of horse-omnibuses, both in the city and suburbs, but they are dirty and badly horsed, and only used by the poorer population, the tariff of charges being very moderate.

Cabs. Havana is well supplied with cabs. These are 1-horse Victorias, and many of them and the horses employed are excellent. The fare is 10*d.* for each journey within the town radius.

Volante. The national carriage is the Volante, and no other is used in the country in Cuba. It consists of a two-seated carriage in the form of an old English buggy, slung rather low down by leather straps from the axle of two very large wheels, and has shafts 15 feet long. The horse in the shafts is led by a postillion, whose horse is also harnessed to the carriage with traces. In the case of a long and rough journey a third horse is harnessed on the other side of the shafts in the same manner.

The carriage is extremely comfortable to travel in, and the great height of the wheels and their distance apart prevents all danger of turning over, although the roads in the country are, for the most part, mere tracks through fields and open land.

Telegraph cables. There are four ocean telegraph cables connected with Cuba. They are as follows:—

The International Ocean Telegraph Company has a cable from Havana to Florida in connection with the United States Western Union Telegraph Company.

The Cuban Submarine Telegraph Company, Limited, has a cable connecting Havana with Santiago de Cuba and Cienfuegos.

The West India and Panama Telegraph Company has a cable connecting Havana with Santiago de Cuba, Jamaica, Puerto Rico, the Lesser Antilles, and the Isthmus of Panama.

The "Compagnie Française de Câbles Sous-Marins" has a cable connecting Havana with Santiago de Cuba, Hayti, S. Domingo, Venezuela, and Brazil.

The only three towns in Cuba having cable connection are Havana, Cienfuegos, and Santiago de Cuba.

Inland telegraph. The telegraph system in Cuba is in the hands of the Government. There are wires connecting all the towns and villages in the island.

Telephone system. The telephone system in Havana also belongs to Government, but is farmed out for a limited number of years to a company called the "Red Telefonica de la Habana." Nearly all the public and private buildings in the city and suburbs are connected by telephone.

General remarks. Cuba is 600 miles in length; in width it ranges from 21 miles at the narrowest part to 111 miles in the broadest, and covers an area of 34,233 square miles.

Population. The population, according to the official gazette for the election of deputies, is 1,631,696 inhabitants, of which 65 per cent. are white.

The population is distributed over the different provinces of the island in the following manner:—

Province.	Population.
Havana	451,928
Santa Clara	354,122
Santiago de Cuba	272,379
Matanzas	259,587
Pinar del Rio	225,891
Puerto Principe	67,789
Total	1,631,696

Governor-General.

The supreme authority is the Governor-General, who is also Captain-General of the forces in the island. He is nominated in Madrid, and is directly responsible to the Minister of the Colonies (Ultramar).

Council of Administration.

Under him is the Council of Administration ("Consejo de Administracion"), a body whose members are nominated by royal decree.

Provinces.

There are six provinces in Cuba, each province having a capital town of the same name, as follows:—Habana, Matanzas, Pinar del Rio, Santa Clara, Puerto Principe, Santiago de Cuba.

Civil Governors.

Each province has a civil Governor nominated by the Crown, but under the authority of the Governor-General.

Provincial Deputies.

In each province there is a body of provincial deputies (Diputacion provincial) who are elected by the people, there being a fixed number for each province as follows:—

Province.	Number of Deputies.
Habana	20
Matanzas	15
Pinar del Rio	12
Santa Clara	17
Puerto Principe	12
Santiago de Cuba	18

The members are elected for a period of 4 years, there being an election every two years of half the members.

Mayor.

Councillors.

Each town has a Mayor (Alcalde Municipal) and a Board of Councillors (Arguntimiento) presided over by him, all of whom are elected by the people of the town.

Cuba is represented in the Spanish Cortes in the following manner:—

There are 16 Senators and 30 Deputies.

Senators.

Of the Senators, Havana elects three, and the other provinces two each, the Economical Society (Sociedad Economica) and University of Havana one each, and the Bishopric of Havana and Archbishopric of Santiago de Cuba one between them.

Election of Senators.

They are elected by the members of the municipalities and the highest tax payers; the number of electors being four times as

many tax-paying electors as there are members of the municipality, together with the members of the municipality.

A new arrangement for the election of Deputies came into force for the last election in April, 1893. Deputies.

The island is divided into districts, and the number of deputies is arranged so that each deputy nominally represents 50,000 of the population of the island. All voters must be upwards of 25 years of age and of 2 years' residence, and must pay taxes upwards of 5 dol. per annum, with the exception of Government employés with salaries of more than 200 dol. per annum. Manner of election.

The following are the centres where the elections take place and the number of deputies representing them, making thirty in all:— Places of election.

Province.	Centre.	Number of Deputies.
Havana	Habana	6
	Guanabacoa	1
	Jaruco	1
	Guines	1
Matanzas	Matanzas	3
	Colon	1
	Cardenas	1
Pinar del Rio	Pinar del Rio	3
	Guanajay	1
Puerto Principe ..	Puerto Principe	1
Santa Clara	Santa Clara	4
	Sancti Spiritus	1
	Remedios	1
Santiago de Cuba ..	Santiago de Cuba.. ..	3
	Holguin	1
	Manzanilla	1

There are 843 public schools in Cuba, making an average of one school for every 1,800 persons. They are distributed over the different provinces as follows:— Schools.

Province.	Number of Schools.
Havana	209
Pinar del Rio	137
Santiago de Cuba	118
Matanzas	148
Santa Clara	195
Puerto Principe	36

In each province there is an institute for higher education (Instituto de Segunda Enseñanza) in which it is necessary to study 5 years and take a degree before entering the University. Higher education.

University. In Havana there is the University and also three schools subsidised by Government:

School of Painting.
1. Saint Alexander, for painting and sculpture.
2. Technical College (escuela profesional).
3. School for Teachers (escuela normal para maestros).

Banks. The feeling of insecurity in the two principal banks has greatly increased the difficulties of the year under review.

The Banco Español. The Banco Español (Spanish Bank) which has the sole right of issuing notes in the island under a privilege granted by Government, has lost much of the prestige and confidence that so important an undertaking should command, although strenuous efforts have been made on its behalf, without much apparent success.

The Banco de Comercio. The Banco de Comercio (Commercial Bank) which holds the chief interests in the important railway the "Ferro Carriles Unidos" was obliged to suspend payment in August last, owing to inability to call in advances on unsold sugar. It is agreeable to note that the arrangements made that all deposits should be repaid in ten monthly instalments, together with 6 per cent. interest, is being faithfully carried out, and the Bank shows every prospect of resuming its business and regaining its former influence.

Proposed English bank. It has been constantly rumoured during the last year that an English bank had the intention of establishing in Havana. At present there is no such undertaking; but there is no doubt that there is a promising opening for a bank accustomed to carry on business in these countries. It would, however, require most careful management, and the manager placed in charge of it should not only be well acquainted with banking, but have also a thorough knowledge of the Spanish language and Spanish methods of doing business.

Fire brigades. There are two fire brigades in Havana, the "Bomberos Municipales," and the "Bomberos de Comercio." The latter is supported by public subscription, and the members of the corps

How supported. give their services entirely without payment. They are chiefly composed of the well-known young men of the town, and great pride is taken in the splendid equipment of the corps.

Bomberos Municipales. The "Bomberos Municipales" are supported by the municipality, and the corps includes a large number of coloured men, who also work without payment. There are about 150 telephonic alarm stations, and both corps are noted for their proficiency in carrying out their duties.

The following are the returns furnished by the different Vice-Consuls at the outlying ports of the island:—

MATANZAS.

Mr. Vice-Consul d'Costa reports as follows:—

Condition of trade. Trade within my district has not generally been satisfactory during the past year. The bad condition financially of the

principal commercial centres of the world, particularly in the United States, has had its effect here.

Sugar crop. The sugar crop, our principal article of commerce, while not small, was, owing to unfavourable weather for cane raising, less than in the years immediately preceding this. Some hopes were entertained owing to the short crop and small stock of sugar in the United States, our principal consumer, that good prices would prevail, and in this way partially compensate the planter for the loss in sugar producing.

Prices of sugar. The market opened fairly well in December, about $6\frac{3}{4}$ reales (2*s.* 9*d.*) per arroba (25 lbs.), and continued to improve until during June, when $9\frac{1}{8}$ reales (4*s.*) was obtained, a figure not reached since 1889. Though late in the season, something like one-fifth of the crop was still in first hands, so confident were holders of these sugars that prices would considerably further advance. The prices asked in consequence were so very much above merchants' ideas that no sugars changed hands for a good period of time. When holders were willing to let go no buyers appeared, and no sales were effected for something like three months, and then at $5\frac{1}{4}$ reales (2*s.* 2*d.*).

Financial difficulties. Spanish bank. Meanwhile the financial difficulties in the United States had become very serious, making it impossible to dispose of sugars there, causing much distress here, and compelling our only bank—a branch of the Spanish Bank of Cuba—to suspend gold payments, and in its place offering gold "Bills" issued by themselves, which were not currently accepted, causing still further difficulties, and at a time when planters were in most need of assistance in their estates. This state of things continued throughout this year, and is still being felt, the average price of sugar before July being $7\frac{1}{8}$ reales (3*s.*).

Trust company. Some feeling was expressed against the American Sugar Refining Company, commonly called "Trust," which seems to control both raw and refined sugar in the United States. There are those who think some blame can be put on this company for much of the financial troubles here.

Banking. Banking facilities here are difficult. A city of 56,000 inhabitants, whose exports are valued upwards of 3,000,000*l.*, and which imports heavily, for nearly everything used here comes from abroad, is practically without a financial institution of any kind.

Spanish Bank of Cuba. The branch of the Spanish Bank of Cuba has not paid gold since October, and is absolutely unprepared to do business, having no gold to dispose of; consequently, its former patrons decline to deposit there at present. It is believed, however, that in a short time their affairs will be cleared up and business continued, although possibly on a smaller scale. It appears to me that an excellent field is open here for a bank. A chartered institution would be best, but it is probable that much opposition would be experienced in Madrid to a concession of this nature. A private bank or banker, with capital enough to be independent, could, with absolute security, do a conservative business reaching very high figures, and realise upwards of 10 per cent. per annum.

Regular bank discount in good times is 8 to 9 per cent. on three months' bills, just now no regular rate can be quoted, and commercial paper of the highest grade in the market would find no takers under 12 per cent.

Public works: bridges.

The bridges which were washed away in June, 1892, have not yet been replaced. The principal one, although the material is here, has not been commenced, as the city Government has not yet decided how to build it. The other bridge (St. Luis), which was temporarily arranged so that passing over it was possible, is still in the same bad condition, and it is feared that it will soon collapse.

Pavements.

A short street in the business centre is being put into a condition to pave, with a manufactured article made of iron dross and clay, brought over from Sunderland. It appears most durable, and if this trial gives the results claimed for it more streets will be paved in the same way, which would certainly be a great improvement to the city.

Matanzas Railway Company.

The Matanzas Railway Company (Sabanilla R.R.), which has its head offices here, is extending its road in all directions, principally south and east. It is proposed to make a connection at Rodas with the Cienfuegos Railway Company, making it possible to cross the island from here to Cienfuegos by this road in 6 hours.

Machinery.

Sugar planters continue spending large sums of money on machinery. I am pleased to note that a great quantity has been ordered from Great Britain. Notwithstanding the duties, British machinery competes favourably with that of the United States. The American machinery has, however, the advantage of being much nearer, and so can be had almost immediately.

Gas company.

The Electric Light and Gas Company seem to hold their own, while the Telephone Company is increasing its number of members at a subscription of 1*l.* per month, and appears to be prosperous.

British shipping.

British shipping has been fairly satisfactory, taking into consideration the general financial condition of the district and the short crop.

The British vessels which arrived at the port of Matanzas during the year 1893 were as follows:—

	Number of Vessels.	Tons.
Steam	95	109,743
Sailing	8	4,806
Total	103	114,549

Imports.

Returns of imports are impossible to obtain with any degree of exactitude. As no statistics are available, the only way would be to peruse every entry made in the custom-house, provided the

authorities would permit this, but some doubts might even then be expressed as to the accuracy of these entries.

Exports.

Exports to the value of nearly 3,000,000*l.* have been cleared from this port during the year under review. These consisted principally of sugar, rum, and molasses. About 60 per cent. of the sugar was carried by British ships, and 146,114 bags valued at 324,267*l.* went to Canada, being the largest quantity shipped in one year to any British possession since 1873.

RETURN of Principal Articles Exported from the Port of Matanzas during the Year 1893.

SUGAR.

Destination.	Quantity.	Value.
	Bags.	£
United States	1,022,608	2,356,398
British possessions	146,114	324,267
Spain	4,086	9,747
Total	1,172,808	2,690,412

Destination.	Quantity.	Value.
	Hogsheads.	£
United States	2,066	19,326

RUM.

Destination.	Quantity.	Value.
	Hogsheads.	£
Montevideo	3,259	14,875
Bremen	1,100	5,041
Spain	1,162	2,904
Buenos Ayres	341	1,556
New York	431	1,970
Liverpool	200	934
Total	6,493	27,280

MOLASSES.

Destination.	Quantity.	Value.
	Hogsheads.	£
England	1,146	2,170
United States	19,550	58,600
Total	20,696	60,770

CARDENAS.

Sugar prospects. Mr. Vice-Consul Fitzgibbon reports as follows :—

The district of Cardenas is generally considered to be one of the richest in the island in the production of sugar. Judging from present prospects the crop of 1894 is expected to surpass that of 1893 and be equal to that of 1892, which was the largest crop ever made, not only in this district, but in all the island.

Population. The population of the city of Cardenas is generally set down at 24,000 souls and that of the jurisdiction at 45,000.

Mines. There are no mines in this district.

Molasses. Distilleries. In this city there are three molasses boiling-houses and four distilleries. The wages of the people employed in them vary from 4*s.* to 14*s.* per day.

Public health. Public health is generally very good with the exception of the summer months, when yellow fever prevails, although this district is considered fortunate in that respect.

Harbour. The harbour of Cardenas can only receive vessels drawing 15 feet of water, which obliges large vessels to anchor about 15 miles from shore among the Keys, thereby causing increased charges for lighterage and much delay.

Coal. The importation of coal for this port during the year was as follows :—

	Quantity.
	Tons.
American coal under American flag ..	16,760
„ „ British flag	7,800
„ „ Norwegian flag ..	1,118
Total	25,678

In the future most of the American coal coming from this port will be conveyed in American sailing ships, and as American coal is cheaper than English on account of duties and high freights the import of English coal in this port will cease.

RETURN of British Shipping at the Port of Cardenas during the Year 1893.

	Number of Vessels.	Tons.
Steam	67	119,659
Sailing	18	5,566
Total	85	125,225

The imports are chiefly from the United States.

It is impossible to obtain tables of articles imported, and the valuations given below are only approximate.

From—	Value.
	£
Great Britain..	180,110
United States..	496,000
Spain	20,000
Other countries	50,000
Total	746,110

The greater part of the exports this year, as usual, went to the United States. Exports.

Exports of sugar and molasses from this port during the year 1893 is as follows :—

Molasses.

Vessels.	Quantity.
	Hogsheads.
In British	4,538
American	2,079
Total	6,617

Sugar.

Vessels.	Quantity.	
	Bags.	Hogsheads.
In British	439,417	646
American	108,627	..
Spanish	74,833	..
Norwegian	70,223	..
German	21,660	..
Russian	8,200	..
Total	722,960	646

Sagua la Grande.

Mr. Vice-Consul Harris reports that he has been quite unable on the present occasion to furnish the statistical information required by the instructions. He endeavoured to obtain this from the different authorities but quite unsuccessfully.

He states that the condition of his district is fairly prosperous, but that the cessation of gold payments by the "Banco Español" had had a prejudicial effect upon business. General condition.

NUEVITAS.

Mr. Vice-Consul Sanchez y Adan reports as follows:—

The condition of the district has changed but little during the last 12 months.

Financial difficulties.

Scarcity of money and usury prey upon industry and labour. Gold is leaving the country and the value of silver is continually changing suddenly, both of which create much trouble and anxiety in commercial transactions. Money can be obtained in limited amounts from private persons at from 12 per cent. to 24 per cent., and the only banking institution of the province lends at 8 per cent. or 10 per cent. for short terms, on land or the very best securities.

On an Havana newspaper announcing a few weeks ago that some English bankers intended to establish a bank in that city and lend money at reasonable rates, the news was taken up with enthusiasm.

Foreign capital could be invested in this part of the country with great profit and comparatively little risk. Much English money goes to South America which could find here secure and profitable investment.

Railway.

There is no railway except the one from Nuevitas to Puerto Principe, 42 miles in length. The dividend paid by this Company is about 15 per cent. This want of means of transportation checks in a great measure the industrial development of the district.

There are large amounts of timber inland, iron, copper, and chrome ores abound in almost inexhaustible quantities. Sugar, hemp, honey, and cattle need only easier means of transport to widely develop and largely compensate investment.

Sugar.

The sugar crop during last year was much diminished by unfavourable weather.

Timber.

Timber during the year was largely extracted and brought to the coast, but a fall in the prices had produced a corresponding dulness in the market.

Fibre.

A new industry is about to make a start in Nuevitas, where hemp has been planted to the extent of nearly 2,000 acres.

The Cuban Fibre Company, London, has put up a building and machinery to within a few hundred yards of the town. The fibre is excellent, and the trial will be successful if sufficient capital is put into it.

Mines.

The mineral interests rest untouched, partly on account of the financial troubles in the United States, where a Company had been formed for the purpose, and partly because the extent and facilities to work the mines are not well known.

Iron ores, &c.

The mines of different iron ores, chromic iron, and copper occupy an extensive track of open country between the railway on the south, and the Cubitas hills and the seaboard on the north. The Scotch manufacturers of paints could find cheap and inexhaustible raw material, for some of the chrome ore is at a few hundred yards from the railway.

Facilities for mining.

The irons are reported to be of very good quality and in great

abundance. They are at distances from the railway of from 2½ miles to 20 miles, through open sterile country where narrow gauge lines can be laid down at about 1,000*l.* per mile.

I should add that the Railway Company has lowered the freight on minerals to 25 c. per ton regardless of distance.

The port of Neuvitas has registered this year the first steamer on her role. It was built in England and bought by a Company at Puerto Principe to ply between Nuevitas and Havana with cattle, freight and passengers. Steamer from Nuevitas to Havana.

The following is a table of the arrivals and departures of vessels in the port of Nuevitas during the year 1893:— List of shipping for 1893.

RETURN showing Arrivals and Departures of Vessels during the Year 1893.

ARRIVALS.

Countries.	Number of Vessels.		Total.	
	Steam.	Sailing.	Number of Vessels.	Tons.
Spanish	10	9	19	20,980
American	1	19	20	7,524
English	3	37	40	8,995
Norwegian	3	13	16	5,900
Swedish	..	5	5	1,507
German	2	7	9	5,881
Total	19	90	109	50,787

DEPARTURES.

Countries.	Number of Vessels.	Tons.
To United States, with cargo ..	30	11,651
Europe, with cargo	29	8,293
Nassau, N.P., with cargo ..	24	956
In transit	18	25,358
ballast	5	1,234
Total	106	47,492

CIENFUEGOS.

Mr. Vice-Consul Fowler forwards the following remarks on the trade, commerce, and agriculture of his district for the past year:—

As mentioned in last year's Report, the total want of statistics of the import trade of this district makes it a very difficult matter Trade and commerce.

to give any reliable information. I find, however, that, as I surmised, the direct imports from Great Britain diminish from year to year owing to the Reciprocity Treaty with the United States and the very insignificant or nil duties now levied on goods from Spain, and with the exception of East Indian rice and jute bags, which reach here viâ Liverpool and appear to hold their own. We have lost, or nearly so, the trade in machinery, railroad iron, hardware, dry goods, and earthenware, which was quite important before the said treaty, and the so-called coastwise trade with the mother country placed most of their productions on the free list, while ours have to contend with a heavy duty, varying from 30 to 35 per cent. on the valuation thereof.

A few articles in dry goods—say, the finer qualities of linen from Belfast, and coarser textures of this material from Manchester and Dundee, not manufactured as yet in Spain, still meet with sale; also ale and certain kinds of hardware, such as cane knives ("machetes"), iron cooking pots, iron bedsteads, smooth galvanised sheet-iron for roofing, brass and iron screws, padlocks, wire rope, and wire textures, copper and brass tubes, which still compete advantageously with importations of similar goods from the United States or Spain, notwithstanding the above-mentioned duty.

Jute bags.

I learn that they are improving and erecting new factories in Spain for working jute to supply the demand for sugar bags, and as the duty on foreign importations of the same amounts to 3 c. per 1 lb., they will succeed, I apprehend, in closing that door upon us also.

The importation of bags at this port sum up about 1,200,000.

Imports from Canada.

The importations from Canada consist almost exclusively of spruce boards from Nova Scotia, the demand for which for building purposes appears to be steady the year throughout.

The following are the market prices of some goods in Spanish gold :—

Articles.		Price.
		Dol.
Rice	Per quintal ..	3¼
Ale	Per dozen pints ..	2¾
Spruce lumber	Per 1,000 feet ..	24
Jute, bags of 2½ lbs. ..	Each	21 c.

The prices of linens and hardware vary so much that it is almost impossible to quote them.

Shipping and navigation.

I have no alteration in port dues to refer to. Shipbuilding is limited to the construction of small lighters and steamers for port and river services. The facilities for landing and embarking are ample, with private docks, barges, &c. Return freights during the shipping season from January to May can generally be had, but almost exclusively restricted to charters for the United States, at rates varying from 12 c. to 15 c. per 100 lbs. for sugar in bags.

SUMMARY of British Shipping Entered and Cleared during the Years 1893–92.

ENTERED.

Description.	1893.		1892.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Steamers	35	38,863	30	31,452
Sailing vessels	32	12,671	21	7,981
Total	67	51,534	51	39,433

CLEARED.

Description.	1893.		1892.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Steamers	35	38,863	29	30,417
Sailing vessels	28	11,248	20	7,589
Total	63	50,111	49	38,006

SUMMARY of Foreign Shipping during the Years 1893-92.

Nationality.	Arrivals.				Departures			
	1893.		1892.		1893.		1892.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Spanish	118	180,696	129	190,079	117	180,456	130	192,214
American	108	91,059	118	93,934	103	87,751	124	96,490
Norwegian	12	6,881	8	4,945	12	6,881	10	6,039
German	4	6,512	1	768	4	6,512	1	768
Danish	1	594	..	..	1	594	..	..
Italian	3	1,615	1	412	3	1,615	2	1,048
Haytian	2	289	2	280	2	289	2	280
Austrian	1	468	..	..	1	468	..	..
Swedish	..	..	3	1,566	..	..	3	1,566
Russian	..	..	1	677	..	..	1	677
Total	249	288,114	263	292,661	243	284,566	273	299,082

I gave the census of this district in my previous report, rates of wages, &c., and have no variation to refer to in the same. Population and industries.

The public health suffered severely during the last summer, as yellow fever was unusually prevalent then, and many natives fell victims to the disease while the epidemic lasted, which rarely occurs. The port is now healthy. Public health.

The Cienfuegos and Villa Clara Railroad Company has constructed a fine wharf opposite their depôt in the harbour for shipping purposes which has been opened to traffic recently, and admits at present vessels drawing 15 feet of water. They continue dredging the same to deepen it to 18 feet. Merchandise, machinery, &c., landed at the dock incurs a charge of 50 c. per ton, sugar 5 c. per bag. Public works.

General Remarks.

The revenue of the island has diminished to such an alarming extent from the concessions to the mother country and the United States, that I think some radical change must be made ere long in the tariff if bankruptcy is to be avoided, as the deficiency, amounting to several million of dollars yearly, cannot long be withstood. Such a policy, if adopted, might place us again on an equal footing with those now so specially favoured, when I have no doubt we should promptly regain a fair proportion of the important trade we have lost under the present adverse circumstances.

The different Chambers of Commerce of the island have solicited and re-solicited from the Government that duties should be again levied on imports from Spain, but this has not been conceded as yet, and it is now rumoured that the Reciprocity Treaty with the United States may terminate shortly if they impose a duty there again on raw sugar, which some parties are said to advocate.

Agriculture.

Agriculture in this district is almost exclusively limited to the cultivation of sugar-cane, large grazing farms for raising cattle, and smaller ones for supplying the city and country towns with fruit, vegetables, and ground roots.

We have no foreign trade in cattle, and the excess of production beyond the local consumption is sent to the Havana market and sold there. No reliable return of the several descriptions produced has been published that I could refer to. Beef retails in our market at from 15 c. to 30 c. per lb. according to quality; pork at 20 c.; and mutton from 15 c. to 20 c. I am informed that both cattle and hogs suffer at intervals from congestion diseases that are said to be contagious, and which they check by burning the bodies of those that die. Cattle.

I append a return of the exports from this port for the past year, which indicates the full extent and value of what was produced during the said year, and whence exported. The United States absorbed nearly the whole of the trade. Great Britain and colonies but a very small proportion. Return of exports.

(75 6|94—H & S 1793)

RETURN of the Exports from the Port of Cienfuegos during the Year 1893.

Articles.	Foreign Weights or Measures.	To Great Britain and Colonies.		To Spain.		To United States.		Total.	
		Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	English Weights.	English Money.
			Dollars.		Dollars.		Dollars.		£
Sugar	Tons ..	727	48,500	1,945	120,690	130,676	8,703,730	119,055	1,776,384
Molasses	Gallons ..	..	..	..	..	173,549	10,350	173,549	2,070
Honey	.. ..	..	..	..	..	4,310	1,500	4,310	300
Cigars	Mille ..	..	..	12	480	31	1,400	43	376
Tobacco	Bales ..	..	..	2	60	1,145	34,354	1,147	6,882
Mahogany	Mille feet ..	..	..	..	..	20	1,400	20	280
Hide	Number ..	..	..	..	..	1,292	2,580	1,292	516
Cedar	Mille feet ..	..	..	..	..	5	300	5	60
Rum	Gallons ..	..	..	107,280	14,300	..	..	107,280	2,860
Total	..	..	48,500	..	144,530	..	8,755,610	..	1,789,728

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1337.	Riga	2d.
1338.	Batavia	1½d.
1339.	Boston	1½d.
1340.	Baltimore	1½d.
1341.	Havre	2½d.
1342.	Vera Cruz	1d.
1343.	Saigon	1½d.
1344.	Stockholm	2d.
1345.	Galatz	1½d.
1346.	Trebizond	1d.
1347.	Algiers	3d.
1348.	Amapala	½d.
1349.	Cherbourg	1d.
1350.	Jerusalem	1d.
1351.	Santiago	1d.
1352.	San José	1d.
1353.	Trieste	3½d.
1354.	Madrid	2d.
1355.	Teneriffe	½d.
1356.	Havana	2d.
1357.	Paraguay	5d.
1358.	Guayaquil	4½d.

No. 1359.

Reference to previous Report, Annual Series No. 1269.

SPAIN.

CADIZ.

Consul Henderson to the Earl of Kimberley.

My Lord, *Cadiz, March* 27, 1894.

I HAVE the honour to transmit to your Lordship herewith enclosed my Report on the Trade of my Consular District during the year 1893.

I have, &c.
(Signed) P. HENDERSON.

Report on the Trade and Commerce of the Consular District of Cadiz for the Year 1893.

ABSTRACT of Contents.

	PAGE
Cadiz—	
Remarks	2
Shipping and salt	2
Wine	2
Public health	2
„ works	2
Huelva—	
Trade of	3
Tables of imports and exports	5
Seville—	
Trade of	8
Tables of imports and exports	9
San Lucar—	
Trade of	12
Shipping	12
Imports and exports	12
Ayamonte—	
Trade of	13
Industries	13
Mines	13

Abstract of Contents—continued.

	Page
Port St. Mary—	
Trade of	13
Vintage..	13
Jerez—	
Trade of	14
Vintage..	14
Export trade	14
Import „	14
San Roque—	
Trade of	14
Agriculture and commerce	14
Railways	15
Public health	15
Algeciras—	
Trade of	15
Table of shipping	15
„ imports	16
„ exports	17

Remarks. In my report for last year I stated that there seemed little prospect that the trade of this place could ever recover, and the air of desolation and decay pervading the whole town is lamentable.

Strange to say the Russian Government has been the first to recognise the altered state of affairs, and the Russian Consulate-General, which was established here by Peter the Great, has been abolished and transferred to Barcelona. The French Government too has reduced the status of the French Consular establishment.

Shipping. Although the movement of British shipping is apparently in excess of 1892, it is in reality less, the excess being accounted for, firstly, by the large number of steamers on pleasure cruises to the Mediterranean, which make Cadiz their first port of call, and, secondly, by Knott's cargo steamers touching here on their way from the Mediterranean to America, a few butts of wine being a sufficient inducement for these steamers to call here. This increase amounts to 36 ships.

Salt. The exportation of salt to the British colonies has largely decreased, whereas the trade in this article to the north of Europe and South America has been very much brisker.

The Norwegian Government, always alive to the interests of trade, has subventioned a line of steamers to develop the trade which has taken this new direction. The first steamer of this new line is advertised to leave here for Lisbon, Christiania, Bergen, Alaesund, Christiansund, and Trondhjem, at the end of March.

Wine. The export of wine to Great Britain and the British colonies shows no revival.

Public health. The public health is unsatisfactory, and the mortality during the past winter has been excessive; the usual mortality of 45 per 1,000 having been greatly exceeded.

Public works. There is no information to be imparted regarding public works. There is great misery and poverty throughout the province, and the Government has done what it could to find work for the

unemployed, in repairing roads, etc. The local Treasury is never very well filled, and with the limited means at the disposal of the local authorities but little relief could be given to the famishing workmen.

The number of vessels which visited the port of Huelva during the past year was 846, with a tonnage of 638,832, divided as follows: 602 British with 467,872, 157 Spanish with 116,716, 26 French with 13,598, 32 German with 21,337, 10 Swedish and Norwegian with 6,792, 2 Italian with 1,168, 2 Belgian with 2,092, and 1 Russian with 649.

These figures show a decrease on last year's report, on account of the small Portuguese craft not being included, and the falling off in the number of Spanish steamers.

As usual two-thirds of the shipping is British, 228 bringing cargo from and 419 taking ore to the United Kingdom. An unusual occurrence was the arrival of eight British steamers from the United Kingdom in ballast caused by the scarcity of coal during the strike. Of the total number of vessels, 10 only were sailing ships and of small tonnage.

Imports.

The principal imports consist of the necessary materials for working the mines, viz., coal, coke, pig-iron, and steel in various forms, machinery, fire bricks, and timber. The other important articles are grain and codfish. With the exception of grain, codfish and timber, nearly the whole of the imports came from Great Britain, those from other countries being insignificant in comparison.

Norway sent the largest quantity of dried and salt fish. France comes next with Newfoundland fish, and Great Britain with a very small quantity of Scotch codfish. The fish from Portugal is principally sardines and tunny.

Wheat comes from Morocco and France, the latter being probably transhipments from the East. Barley and maize from Morocco.

Exports.

Ore forms almost the only export of any importance from Huelva during the last year. Wine having almost ceased to be shipped on account of the French tariff and the mildew.

Copper and iron pyrites form the great bulk of the exports, in addition to which copper matte and precipitate form important items. Manganese and silver lead ore from this province have also been exported and through this port, mercury from Almaden and pig-lead from Linares.

The other articles are wine and lees, oil, cork and corkwood, wool, and 5,000 tons of oats to France.

Great Britain takes the greatest part of the exports, but Holland, Germany, and the United States take large quantities of ore. Cork goes to England and Germany, wine to all countries, but in small lots, France taking, of course, the largest quantity, but nothing in comparison to what used to be exported before the prohibitive duties were imposed.

Railways.

There is nothing to add to the former report with respect to railways, except that the line from Belmez to the Zafra-Huelva

line, mentioned in last report as in project, appears to have been abandoned on account of the want of success in boring for coal at Belmez.

Mines. The important Lagunazo mines have been transferred from the Société des Mines de Cuivre d'Alosno, Paris, to the Tharsis Sulphur and Copper Company, Limited, Glasgow, for the sum of 60,000*l*.

Agriculture. Wheat, barley, pines, fruits, and nuts have given bad results. Olives fair, and oranges plentiful and of good quality.

Fisheries. The take of tunny fish has been abundant, but the sardine fishery has been unsuccessful.

RETURN of the Principal Articles of Export and Countries to which Exported during the Year 1893.

To—	Articles.		Quantity.
England	Copper pyrites	Kilos. ..	320,664,628
	„ matte	„ ..	17,136,066
	„ precipitate ..	„ ..	30,474,581
	„ ingots	„ ..	50,000
	Iron pyrites	„ ..	241,463,426
	Manganese	„ ..	3,436,700
	Mercury	„ ..	1,106,878
	Silver lead	„ ..	156,488
	Lead	„ ..	900,000
	Cork-wood	„ ..	7,256
	Corks	Mille ..	12,490
	Wine	Litres ..	48,057
Holland	Copper pyrites	Kilos. ..	101,207,870
	„ precipitate ..	„ ..	136,460
	Iron pyrites	„ ..	33,205,280
	Manganese	„ ..	2,860,000
	Lees	„ ..	21,500
Germany	Copper pyrites	„ ..	84,012,200
	„ precipitate ..	„ ..	49,000
	„ ingots	„ ..	627,507
	Iron pyrites	„ ..	19,203,230
	Manganese	„ ..	98,000
	Wine, common	Litres ..	309,300
	„ fine	„ ..	36,864
	Cork-wood	Kilos. ..	39,377
	Corks	Mille ..	28,815
France..	Precipitate of copper ..	Kilos. ..	90,000
	Copper ingots	„ ..	100,000
	„ sulphate	„ ..	190,500
	Iron pyrites	„ ..	44,646,380
	Wine, common	Litres ..	9,365,284
	„ fine	„ ..	19,333
	Oil	Kilos. ..	50,716
	Lees	„ ..	122,368
	Vats	„ ..	5,064,684
	Hool	„ ..	52,853
Belgium	Copper pyrites	„ ..	1,252,100
	Precipitate of copper ..	„ ..	328,850
	Iron pyrites	„ ..	11,169,780
Austria	Iron pyrites	„ ..	4,313,970
United States.. ..	Copper pyrites	„ ..	50,581,630
	Iron „	„ ..	41,687,000
Russia..	Iron pyrites	„ ..	5,611,250

RETURN of the Principal Articles Imported into Huelva during the Year 1893, and Countries of Origin.

From—	Articles.		Quantity.
England	Iron ingots	Kilos. ..	27,627,412
	,, manufactured ..	,, ..	2,876,427
	Coals	,, ..	73,897,624
	Coke	,, ..	11,762,412
	Timber	Cub. metres	232
	Codfish	Kilos. ..	2,431
	Pitch	,, ..	5,329
	Tar	,, ..	1,951
	Cod-liver oil	,, ..	224
Sweden	Steel	,, ..	13,538
	Timber	Cub. metres	3,757
Norway	Codfish	Kilos. ..	306,420
France..	Codfish	,, ..	72,988
	Wheat	,, ..	212,500
Portugal	Timber	Cub. metres	411
	Dried and salt fish ..	Kilos. ..	24,110
Morocco	Wheat	,, ..	152,500
	Barley	,, ..	87,300
	Maize	,, ..	612,600
United States.. ..	Timber	Cub. metres	1,191

RETURN of British Shipping at the Port of Huelva in the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.								Cleared.							
Total Number of Vessels.			Total Tonnage.			Total Number of Crews.	Total Value of Cargoes.	Total Number of Vessels.			Total Tonnage.			Total Number of Crews.	Total Value of Cargoes.
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.			With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		
							£								£
228	8	236	144,768	8,585	153,353	3,795	...	419	...	419	305,527	...	305,527	7,221	...

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.								Cleared.								
Countries whence Arrived.	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.	Countries to which Departed.	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.
	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.				With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		
								£									£
Spain	...	138	138	...	103,511	103,511	2,484	...	France	25	...	25	18,082	...	18,082	448	...
Portugal	...	98	98	...	74,542	74,542	1,566	...	Belgium	2	...	2	1,238	...	1,238	32	...
Italy	...	49	49	...	55,788	55,788	1,054	...	Germany	41	...	41	31,452	...	31,452	666	...
France	...	19	19	...	19,368	19,360	363	...	Holland	74	...	74	65,323	...	65,323	1,406	...
Belgium	1	...	1	670	...	670	18	...	Denmark	1	...	1	511	...	511	15	...
Algiers	...	35	35	...	33,249	33,249	647	...	Spain	...	5	5	...	2,429	2,429	70	...
Madeira	...	7	7	...	7,206	7,206	142	...	Morocco	...	1	1	...	435	435	15	...
Azores	...	4	4	...	3,923	3,923	78	...	United States ...	36	...	36	46,327	...	46,327	800	...
Canary Islands ...	...	14	14	...	14,928	14,928	282	...	Russia	2	...	2	1,578	...	1,578	38	...
Turkey	...	1	1	...	1,334	1,334	22	...									
Total... ...	1	365	366	670	313,849	314,519	6,656	...	Total	181	6	187	164,511	2,864	167,375	3,490	...

SEVILLE.

Exports.

On referring to annexes B and C it will be seen that the exports from Seville in 1893 (as compared with 1892) have increased 692 tons in weight, and 36,816*l.* in value.

Exports to Great Britain.

The exports to Great Britain, however, have decreased by over 30,000*l.*, and this notwithstanding an increase in the export of olive oil of 67,566*l.*

Decrease in minerals and metals.

The decrease has been almost entirely in minerals and metals, as follows, copper pyrites 5,000*l.*, copper precipitate 10,000*l.*, lead in pigs 23,000*l.*, and quicksilver 38,000*l.*

Copper precipitate.

The precipitate is now mostly shipped to the north of Spain where it is turned into copper, being protected by a heavy import duty.

Lead.

The falling off in the shipment of lead is entirely due to the low prices on the English market which have largely curtailed the production in the district of Linares.

Olive oil.

The shipment of olive oil was very brisk during the first three months of 1893. The crop here was very large, while Italy had no surplus for export, the consequence being that all the requirements of the British market were drawn from Malaga and here. The demand, however, on account of strikes in cotton districts and general dulness in the manufacturing trades suddenly ceased in March, and export has been very slack since. This winter's crop is short and the country will probably consume it all, as well as the surplus from last year, so that there is little prospect of any large export. The supply of lubricating oil for the Admiralty was shipped here in 1893, which in itself alone is a large item.

Oranges.

The orange crop was also a large one, so that the export of this fruit has increased by nearly 16,000*l.*

Wine.

The total export of wine has only slightly decreased, but that to France has fallen off some 1,500*l.*

Very little wine is grown in this province, the industry being confined to the part next the province of Huelva, and the vintage last summer was almost nil, the wines being spoilt by mildew.

Imports.

There is the large decrease of 217,490*l.* in the value of the imports as compared with 1892, but this was only to be expected in sight of the high protective tariff now in force.

Glass.

The two exceptions are glass, which has increased 1,440*l.*, and timber, 19,550*l.*

There is no special reason to give for the increase in glass, but that of timber can be easily explained.

By the old tariff the duty on ordinary timber was 2·60 ptas. per cubic metre, which in the new one was raised to 5 ptas. This naturally curtailed importation, but in August, 1893, a new Treaty with Norway and Sweden came into operation, and by it the duty from these countries was fixed at 3 ptas. per cubic metre, and large supplies immediately came in.

New tariff.

It is only necessary to cite a few articles to show how the trade is hampered by the new tariff.

Crude petroleum (large quantities of which come here to be

refined) formerly paid 0·41 ptas. per 100 kilos, and it now pays 25 ptas. Fire-bricks formerly 0·06 ptas., now 3·50 ptas.; caustic soda formerly 1 ptas., now 3·80 ptas.; and agricultural machinery formerly 0·95 ptas., now 14 ptas.

The drop in the import of coal is not entirely due to the raising of the duty from 1·25 ptas. to 2·50 ptas. per 1,000 kilos., but largely to the strikes in England. Coals.

Shipping and Navigation.

Annex A shows a small decrease both in the number and tonnage of the vessels that have entered this port in 1893. Decrease in shipping.

British vessels have increased 7 in number, but their tonnage is 83 tons less than in 1892. British vessels.

Annex A.—RETURN of all Shipping at the Port of Seville during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	11	1,993	79	63,919	90	65,912
Spanish	572	13,896	342	165,494	914	179,390
German	...	...	12	10,214	12	10,214
Swedish	19	6,336	4	2,458	23	8,794
Norwegian	6	2,134	11	4,690	17	6,824
Russian	12	4,339	1	913	13	5,252
Italian	...	...	7	2,686	7	2,686
Belgian	...	...	2	2,371	2	2,371
French	1	79	7	2,139	8	2,218
Other countries ...	3	1,541	4	2,832	7	4,373
Total	624	30,318	469	257,716	1,093	288,034
,, for the year preceding ...	655	34,877	457	254,229	1,112	289,106

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	12	2,203	80	65,698	92	67,901
Spanish	588	14,848	348	168,480	936	183,328
German	...	...	13	10,822	13	10,822
Swedish	17	5,217	3	1,690	20	6,907
Norwegian	6	2,134	9	3,925	15	6,059
Russian	11	4,269	1	913	12	5,182
Italian	...	...	7	2,686	7	2,686
Belgian	...	...	2	2,371	2	2,371
French	1	79	7	2,139	8	2,218
Other countries ...	3	1,541	4	2,832	7	4,373
Total	638	30,291	474	261,556	1,112	291,847
,, for the year preceding ...	664	36,262	460	254,552	1,124	290,814

Annex B.—RETURN of Principal Articles of Export from Seville during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Copper pyrites.. ..	15,488	30,976	17,846	35,692
,, precipitate ..	84	2,100	428	12,840
Lead ore	7,964	79,640	7,906	79,060
Lead	5,822	58,220	7,829	85,019
Corkwood	1,113	33,390	1,042	31,260
Corks	406	20,300	407	20,350
Oranges	9,817	78,536	7,852	62,816
Olives	1,894	75,760	2,018	80,720
Olive oil	3,942	130,086	718	25,130
Wine	962	10,237	1,045	10,324
Quicksilver	720	144,000	910	182,000
Other articles	3,164	29,296	2,683	30,514
Total	51,376	692,541	50,684	655,725

RETURN of Principal Articles of Import to Seville during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Petroleum and oil ..	4,441	44,410	6,996	69,960
Wrought iron and steel	2,448	24,480	3,251	32,510
Fish	1,648	32,960	1,798	35,960
Coals, coke, and pitch..	55,158	55,158	66,900	66,900
Glass	399	11,970	351	10,530
Drugs and chemicals ..	5,342	64,104	6,852	102,780
Timber	24,711	247,110	22,756	227,560
Machinery	1,177	47,080	1,921	76,840
Yarn	608	30,400	697	34,850
Tin-plate	739	18,475	967	24,175
Furniture	105	10,500	113	11,300
Haberdashery	311	24,880	385	30,800
Linen, cotton, and woollens	278	55,600	322	64,400
Wheat	2,957	29,570	8,155	81,500
Steamships	843	8,600	2,400	47,000
Other articles	19,307	105,390	13,681	111,062
Total	120,472	810,687	137,545	1,028,177

Annex C.—TABLE showing the Total Value of all Articles Exported from Seville and Imported to Seville to and from Foreign Countries during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	403,846	434,642	240,893	371,686
France	102,178	81,095	115,096	155,866
Other European countries	121,833	100,700	393,438	422,205
Other countries ..	64,684	39,288	61,260	78,420
Total	692,541	655,725	810,687	1,028,177

Quay and river.

The damage done to the quay by the flood of 1892 is being repaired so slowly that at the present rate it will take many years to put in order again.

The state of the river is pretty much the same as reported a year ago.

Agriculture.

Magnificent crops were expected last summer, but owing to unseasonable rain and cold in May great damage was done.

Average crops.

The crops, nevertheless, of wheat, barley, and oats were above the average, and more than sufficient for local consumption.

Import of wheat.

It will be seen by Annex B that the import of wheat fell last year from 8,155 tons in 1892 to 2,957 tons, caused by all imports ceasing in June.

In another part of my report I mention the vintage and olive crop.

General Remarks.

Iron mine of Monte de Hierro.

In my report for 1892 I mentioned the fact of the sale to Messrs. W. Baird and Co., Limited, of the large iron mine in the district of El Pedroso, called Monte de Hierro; the said firm are at present constructing a railway to unite the mine with the main line between Seville and Merida at a place called Cazalla. It is expected to be finished about the end of this year, and if, as almost certain, they ship their ore here in 1895 there should be a large increase in the shipping of this port.

Special wharves will have to be made, but nothing has been done up to the present.

SAN LUCAR.

Shipping. During the year 1893 some 363 vessels of all nations arrived and cleared at the port of San Lucar, of which 88, of an aggregate tonnage of 39,882 tons, were British. Of these only two discharged coal here, the rest were in transit to Seville.

Vintage. The past vintage in this vice-consular district was inferior to that of 1892, due principally to the want of rain. The total quantity of wine collected may be estimated at about 18,000 butts, viz., 12,000 in San Lucar, 4,000 in Chipiona, and 2,000 in Frebiyena; quality very fair.

Salt. The production of this article during the year 1893 was about 2,891 lasts.

Importation. The principal articles imported through the custom-house at Bonanza were as follows:—

Articles.	Quantity.	From—
	Kilos.	
Coal..	1,153,720	Great Britain
Sulphur	242,100	France
Barley	149,544	Canary Islands

Exportation. The following articles were exported during the past year:—

Articles.		Quantity.	To—
Salt	Kilos. ..	400,000	Portugal and Canary Islands
Oranges	,, ..	41,390	England
Wine lees	,, ..	100,000	France
Wine	Litres ..	367,000	France and Great Britain

besides about 2,000 butts were sent to Cadiz by rail for shipment to London and other ports in the United Kingdom.

Crops of cereals. The following quantities of grains, &c., were gathered in this district during the past year:—

Articles.	Quantity.
	Hectolitres.
Wheat..	21,000
Barley..	9,800
Beans	4,520
Bird-seed	4,340
Chick-peas	2,250
Corn	2,000
Oil	1,270

Ayamonte.

Industries. The chief industry at Ayamonte is the preserving of sardines in oil, tunny fish is also preserved in a similar way. Most of the fishing is done by Spanish boats, but at the same time the Portuguese fishing boats bring a considerable amount of fish. This preserved fish is largely exported abroad, the tunny going chiefly to Italy and the sardines to England and France.

The year 1893 was a very poor one for the sardine fishery, both on the Spanish and Portuguese coasts, consequently the preserving industry was nearly paralysed and the exportation greatly restricted.

The nets in use have up to the present been of hand-made native manufacture, but this industry is being lost owing to the importation of machine-made German, French, and English nets.

All the sailing boats are made out of pine-wood grown in the neighbourhood.

Produce. Various salt-pans have been established in this district, and nearly all the salt thus produced is used in the fish curing factories.

Fruit. Figs are very plentiful and of good quality and flavour, large quantities are exported abroad in boxes after having been dried.

Mines. There are several mines in this district, but only two call for notice, the "Cabezas del Pasto" and the "Herrerias," owned by the Bede Metal and Chemical Company, Limited. The "Herrerias" mines are not exporting yet, but the "Cabezas del Pasto" mines situated 21 kiloms. from the port of La Laja, on the river Guadiana, are in active working.

The iron pyrites contain from 2½ per cent. to 3 per cent. of copper and from 49 per cent. to 50 per cent. of sulphur.

The ore is taken to the port of La Laja by railway and is mostly exported direct to Great Britain in English bottoms; the annual export of ore is about 40,000 tons.

Port St. Mary.

Wine. The sherry trade in the district of Port St. Mary has shown a little more activity during the past year. The shipments having totalled 10,883 butts in 1892, thus showing an increase of 629 butts.

Vintage. Vintage, 1893. The yield has been very short and can be taken as about one-third less than that of the preceding year, which was also a poor one. It may be estimated that 1893, as regards quantity, was about half the average crop.

As regards quality, so far as it can be judged at present, it promises to be very indifferent. There are a limited number of parcels of must which are considered good, and even these are looked upon with suspicion and will be kept in observation till later on in the spring. The price for good must is about 150

pesetas per butt, but intending buyers will not offer for the present.

JEREZ.

Vintage.

The result of the vintage of 1893 at Jerez has been less satisfactory as regards quantity than that of the previous year, the yield of which, as will be remembered, was already 25 per cent. less than that of 1891.

This falling off is accounted for partly by the intense heat during the summer which had the effect of shrivelling up a large percentage of the crop, partly by the appearance of the disease known as "mildew" in some districts during the spring.

As regards quality the reports which have reached me are to the effect that the "mosto" promises to be superior to the crops of the last few years.

Export trade.

The shipments of sherry to all parts of the world amounted to some 5,620,000 gallons as compared with 5,505,280 in 1892, and 7,004,800 in 1891.

The exports to Great Britain were 2,009,432 gallons. The total for 1892 being 2,268,725.

From the above figures it will be seen, therefore, that although the trade has received a slight check in its downward course, the figures of the total shipments show a slight increase over those of the previous year. Great Britain has imported a smaller quantity; the improvement being due mainly to the consumption in Mexico and South America.

Importation of British goods.

The demand for goods of British origin is still very limited and chiefly confined to hoop-iron for casks, but there is some opening for articles of wearing apparel, tinned provisions, and ammunition.

SAN ROQUE.

Agriculture.

The agricultural prospects at San Roque are at present very unpromising, the total rainfall since September last not having as yet registered 17 in., and the crops are, in all parts of the district, backward. Great fears are entertained by landowners and farmers of any sufficient harvest to meet this outlay, whilst amongst the peasantry, and all classes of field labourers, there is great distress and earnest demands for work of any kind.

Commerce.

Commerce is also extremely dull everywhere; the high rates of exchange in the Gibraltar market and other depressing causes, including absence of any gold currency, all contribute to the injury of trade. The local industries of cork and flour and other similar small branches of traffic, which have been adverted to as existing, in my previous reports, continue apparently prospering, but labour under the usual disadvantages of difficulty and cost of transport owing to the continued wretched state of the roads, which unrepaired

simply grow worse from day to day. The Algeciras-Bobadilla Railway affords all the assistance in its power, and that was to be expected from it; but there being no branch lines the transfer of any merchandise to the stations is laborious, slow, and expensive. The at one time proposed opening up of the port of this centre at Puente Majorga, and the increased facilities that would thereby be afforded to commerce, together with the necessarily greater habilitation of the custom-house there, raised hopes of the creation of an extended import and export trade which would undoubtedly have largely benefited the whole district; but the great opposition the scheme evoked, principally, it is said, from Algeciras, together with objections put forward of a military character, have prevented this excellent progressive movement being carried into effect, and it is here considered that the project has completely failed. Railways.

Health throughout the district has been uniformly good, but in this city small-pox has been somewhat rife for the last two months, and the place is still under its influence; but the character of the disease is mild, and the reports respecting it exaggerated. I incline to think it has not gone much beyond a sporadic form, aggravated, as is always the case, by a neglect of hygienic and vaccination laws. Public health.

I regret to have to report the occurrence during this month of a disastrous fire accompanied by loss of life in the cork factory at Linea, known as the "Industria Corchera," belonging to the firm of Larios Hermanos, of Gibraltar, originating as is currently reported in the explosion of a boiler on the premises. A considerable part of the building has been completely wrecked, and numerous operatives thrown out of employ. The matter is the subject of judicial enquiry.

ALGECIRAS.

Shipping.

RETURN of all Shipping at the Port of Algeciras during the Year 1893.

ENTERED.

Nationality.	Number of Vessels.		Tonnage.	Merchandise Discharged.	Passengers Landed.
	Steam.	Sailing.			
				Kilos.	
With cargo—					
Spanish	344	..	181,685	2,458,800	1,850
Foreign	39	..	2,780	5,776,121	..
Spanish	..	582	5,383	2,655,080	6
Foreign	..	..	..	..	..
In ballast—					
Spanish	584	..	194,957	..	1,841
Foreign	11	..	1,459	..	5
Spanish	..	229	1,998	..	..
Foreign	..	2	163	..	12
Total	978	813	388,425	10,890,001	3,714

CLEARED.

Nationality.	Number of Vessels.		Tonnage.	Merchandise Discharged	Passengers Landed.
	Steam.	Sailing.			
				Kilos.	
With cargo—					
Spanish	314	..	175,976	2,901,651	1,188
Foreign	18	..	1,363	1,625,658	..
Spanish	..	619	4,516	2,674,554	..
Foreign	..	..	..	..	..
In ballast—					
Spanish	614	..	200,666	..	1,933
Foreign	32	..	2,874	..	..
Spanish	..	192	2,865	..	12
Foreign	..	2	163	..	..
Total	978	813	388,425	7,201,863	3,134

Agriculture.

Notwithstanding the heavy rains the crops yielded much better results than were anticipated.

Imports and Exports.

The imports have been of more consequence than the exports, and are, in the total, a considerable increase on last year; the exports have also increased.

RETURN of Principal Articles of Import into the Port of Algeciras during the Year 1893.

Articles.		Quantity.	Port of Sailing.
Coal and coke	Kilos. ..	4,810,312	Gibraltar and Cardiff.
Timber	Cubic metres. .	524	Gibraltar.
Geese	Kilos. ..	86,016	,,
Beef and lard	,, ..	463	,,
Codfish	,, ..	23,202	,,
Wheat	,, ..	1,092,890	,,
Flour	,, ..	720,246	,,
Other grains	,, ..	321,274	,,
Dry vegetables	,, ..	91,177	,,
Fruits	,, ..	11,379	,,
Sugar	,, ..	5,587	,,
Coffee	,, ..	347	,,
Cocoa	,, ..	521	,,
Pepper	,, ..	814	,,
Tea	,, ..	468	,,
Preserves	,, ..	767	,,
Eggs	,, ..	22,974	,,
Cheese	,, ..	1,013	,,
Butter	,, ..	1,414	,,
Fresh fish	,, ..	30,653	Ceuta.

Coasting Trade.

Articles.	Entrances.		Clearances.	
	Colonial and Foreign Merchandise.	Spanish Merchandise.	Colonial and Foreign Merchandise.	Spanish Merchandise.
	Kilos.	Kilos.	Kilos.	Kilos.
Building stone	..	..	..	1,257,827
Lime	..	..	73,595	..
Bricks	..	7,200	..	431,000
Roof tiles	..	..	..	324,260
Earthenware	139	12,444	..	2,136
Manufactured iron and steel	6,788	127,541	300	76,941
Nuts	..	37,911	..	650
Salt	..	88,350	..	..
Starch	663	7,108	..	..
Soap	..	1,413	..	78,456
Paper	..	8,775	..	..
Charcoal	..	..	..	25,300
Builts and pipes	..	43,082	..	94,554
„ timber	45,181	55,120	..	18,980
Cork in slabs	..	7,931	..	1,222,305
„ squares	..	8,756	..	75,400
Manufactured in corks	..	..	..	448
Manufactured in other shapes	..	..	..	78,685
Pigs	..	..	..	21,601
Rice	..	265,295	..	5,000
Flour	..	1,043,807	..	..
Dry vegetables	396	43,941	..	19,494
„ fruits	2,600	60,828	..	4,465
Fresh fruits	..	72,117	..	26,506
Oil	..	38,848	..	113,578
Spirits of wine	2,615	84,160	..	17,683
Wine	246	519,393	..	42,018
Total	58,628	2,524,020	73,895	3,987,287

Exports.

The principal articles were:—

Articles.		Quantity.	Port of Destination.
Iron and steel	Kilos.	23,549	Ceuta
Lead	„	2,382,773	Gibraltar
Timber	„	46,870	Ceuta
Flour	„	525,238	Ceuta
Oil	„	267,349	Gibraltar
Straw	„	106,084	Gibraltar
Cork in slabs	„	50,544	Gibraltar
„ manufactured	Number	2,340,000	Gibraltar
Wine	Litres	35,419	Ceuta

Public Works.

Nothing of importance has been done during the last year with the exception of the continuance of the town hall.

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1894.

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SPAIN.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF BILBAO.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1278.

Presented to both Houses of Parliament by Command of Her Majesty, JUNE, 1894.

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1325.	Resht	3½d.	1385.	Buenos Ayres	5½d.
1326.	Florence	1d.	1386.	Caracas	1½d.
1327.	Hakodate	1d.	1387.	Vienna	1½d.
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1329.	Paramaribo	1½d.	1389.	Panama	1½d.
1330.	St. Petersburg	2½d.	1390.	New Orleans	2½d.
1331.	Patras	1d.	1391.	Marsala	2d.
1332.	Cuxhaven	2½d.	1392.	Foochow	1d.
1333.	Leipsic	1d.	1393.	Ningpo	1d.
1334.	Bordeaux	2½d.	1394.	Chinkiang	1d.
1335.	Taganrog	1d.	1395.	Tamsui	1d.
1336.	Galveston	8½d.	1396.	Chungking	1½d.
1337.	Riga	2d.	1397.	Philadelphia	3½d.

No. 1398.

Reference to previous Report, Annual Series No. 1278.

SPAIN.

BILBAO.

Acting-Consul de Larrea to the Earl of Kimberley.

My Lord, *Bilbao, May* 21, 1894.

I HAVE the honour to transmit to your Lordship, herewith, the Annual Commercial Report of this Consular District for the year 1893.

I have found it very difficult to obtain reliable and properly classified statistics, hence the delay incurred on transmission.

I have, &c.

(Signed) VICTOR DE LARREA.

Report on the Trade and Commerce of the Consular District of Bilbao for the Year 1893.

ABSTRACT of Contents.

	PAGE
Shipping and navigation	1
Trade and commerce	6
Mining	18
Industries and factory system	24
Railways	28
Public works	29
Sanitary condition of Bilbao	31
Shipbuilding yard	32
Shipping at Santander	33
Imports and exports at Santander	34

Shipping and Navigation.

British shipping.

The number of British vessels arriving at Bilbao during the year 1893 was nearly the same as the number in 1892, but there was an increase in the tonnage, as may be seen from the following table :—

Year	Number of Vessels	Tons.	Crews.
1889	2,013	2,220,545	34,170
1890	2,168	2,389,085	36,894
1891	1,523	1,706,848	26,756
1892	1,698	1,976,436	30,037
1893	1,672	2,234,271	30,016

Vessels with cargoes.

The percentage of British vessels arriving with cargoes continues to decrease, the difference consisting principally in those engaged in the indirect trade.

Year.	From the United Kingdom.	From other Countries.	Total.
	Per cent.	Per cent.	Per cent.
1889	15·65	1·15	16·75
1890	17·0	3·0	20·0
1891	18·51	3·02	21·53
1892	12·66	1·34	14·0
1893	12·32	0·84	13·16

Of the total British tonnage clearing from Bilbao 89 per cent. were bound to the United Kingdom.

Vessels in ballast.

The proportion of British ships arriving in ballast in 1893 was roughly equal to that of 1892; the countries whence they arrived being practically the same, viz., France, England, Portugal, Spain, Italy, and Holland. Only 5 British vessels left in ballast in 1893 (3 to Spain, 1 to Portugal, and 1 to Italy), against 8 vessels cleared in ballast in 1892. (For full particulars of British shipping see return herewith attached.)

Sailing ships.

Sailing ships have almost been excluded from the trade to this port. Only 8 British sailing ships arrived in 1893, measuring 1,155 tons burden.

General shipping.

The British flag maintains its pre-eminence at this port:—

Nationality.	Number of Vessels.	Tons.	Total Number of Crews.	Total Number of Passengers.
British	1,672	2,224,561	..	..
Spanish	1,676	581,253	..	..
French	270	158,581	..	..
German	120	86,371	..	..
Belgian	49	50,688	..	..
Dutch	43	40,640	..	..
Swedish and Norwegian	96	47,680	..	..
Danish	21	7,740	..	.
Portuguese	1	795	..	.
Russian	1	583	..	..
Total	3,949	3,198,843	60,032	2,855

TABLE showing Average Rate of Freight during the Year 1893. Freights.

INWARD FREIGHTS.

Description.	From—	Average Rate of Freight. £	s.	d.
Coal	Wales	0	4	3
	Newcastle	0	4	3
General cargoes..	United Kingdom ..	0	13	9
	France	0	16	0

OUTWARD FREIGHTS.

Description.	To—	Average Rate of Freight. £	s.	d.
Iron ore	Cardiff	0	4	6
	Newport	0	4	6
	Swansea	0	4	9
	Newcastle	0	5	3
	Middlesborough ..	0	5	7½
	Glasgow	0	5	9
	Rotterdam	0	5	11
	France	0	3	0
Pig iron	Italy	0	11	0
General cargoes..	United Kingdom ..	1	0	0
	France	0	16	0

The epidemic of cholera that prevailed during last autumn had a disadvantageous influence upon the freight market, consequent upon the heavy dues and quarantine restriction which in many cases were too strictly enforced and which occasioned severe losses to owners. Cholera.

The two pilot steamers that were established have been of great use to ships frequenting the port, as a pilot now is always procurable at sea as long as the bar is passable. British ship-masters, however, think that it would be advantageous if in bad weather, not bad enough to prevent ships going out, the pilot steamers were ordered to take the pilot from the outcoming ships. because, in some instances, ships have been unable to discharge the Spanish pilot and have been compelled to take him to England. Pilots.

The port is well supplied with tug steamers, some of which are both powerful and handy, being handled by most efficient men. Tug-boats.

The electric lights at the harbour mouth and lower reach are a great success, and facilitate very much the entry and departure of vessels at night time. Electric lighting.

The buoys to moor ships in the various reaches of the river facilitate the movements of ships and have proved very useful. It Buoys.

is expected that the port authorities will soon give attention to a matter long desired by shipmasters and will double the number of buoys in the lower reach, so as to avoid damages through one ship breaking another adrift, during the time a heavy swell sets in. It is also expected that they will place 2 or 3 buoys on the sand edge on the side of the channel opposite to the pier, to show how far a vessel may go towards the sand, and as a safeguard to shipping entering and leaving the port.

Return of British Shipping at the Port of Bilbao in the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.								Cleared.							
Total Number of Vessels.			Total Tonnage.			Total Number of Crews.	Total Value of Cargoes.	Total Number of Vessels.			Total Tonnage.			Total Number of Crews.	Total Value of Cargoes.
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.			With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		
							£								£
206	376	582	243,039	563,263	806,302	10,699	590,726	1,505	...	1,505	1,970,503	...	1,970,503	26,902	1,676,347

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.								Cleared.							
Countries whence Arrived.	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.	Countries to which Departed.	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes
	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.				With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		
								£									£
France	2	795	797	1,902	1,031,117	1,033,019	13,964	31,500	Holland ...	95	...	95	153,974	...	153,974	1,872	129,995
Portugal ..	1	127	128	1,314	159,709	161,023	2,247	3,750	France ...	46	...	46	68,117	...	68,117	849	48,000
Spain	4	101	105	3,023	124,462	127,485	1,834	9,921	Belgium ..	7	...	7	12,304	...	12,304	146	10,367
Italy	...	30	30	...	54,329	54,329	648	...	Italy	6	1	7	9,670	1,314	10,984	139	37,100
Holland ...	...	13	13	...	25,405	25,405	285	...	United States	2	...	2	4,236	...	4,236	44	3,445
Belgium ...	...	6	6	...	7,738	7,738	106	...	Spain	...	3	3	...	3,250	3,250	48	...
Sweden and Norway ...	2	1	3	2,739	1,182	3,921	56	3,906	Portugal ...	...	1	1	...	1,193	1,193	17	...
United States ...	3	...	3	5,939	...	5,939	66	38,165									
Germany ...	...	2	2	...	4,031	4,031	43	...									
Russia	2	...	2	3,650	...	3,650	49	13,812									
Tunis	...	1	1	...	1,421	1,429	19	...									
Total, indirect	14	1,076	1,090	18,567	1,409,402	1,427,969	19,317	101,054	Total, indirect	156	5	161	248,301	5,757	254,058	3,115	228,907
,, direct ...	206	376	582	243,039	563,263	806,302	10,699	590,726	,, direct	1,505	...	1,505	1,970,503	...	1,970,503	26,902	1,676,347
Grand total ...	220	1,452	1,672	261,606	1,972,665	2,234,271	30,016	691,780	Grand total	1,661	5	1,666	2,218 804	5,757	2,224,561	30,017	1,905,254

Trade and Commerce.

Official statistical information is published in Spain at long deferred dates. It has not therefore the merit of timeliness which is as desirable as accuracy.

The following figures relating to the importation and exportation at Bilbao in 1893 have been obtained through private means. They have taken long to collect, but they are supposed to be correct, although they could not be procured so much in detail as it would have been desired.

COMPARATIVE Statement of Imports during the Years 1891–93.

COAL.

Year.	Quantity.				
	From England.	From Germany viâ Holland.	From France.	From Belgium.	Total.
	Tons.	Tons.	Tons.	Tons.	Tons.
1891..	376,948	189	437	..	377,574
1892..	344,630	27,028	142	40	371,840
1893..	302,323	29,677	..	20	332,020

COKE.

Year.	Quantity.		
	From England.	From Germany viâ Holland.	Total.
	Tons.	Tons.	Tons.
1891	128,091	3,600	131,691
1892	56,940	40,572	97,512
1893	78,982	38,450	117,432

The importation of coal and coke was solely from the United Kingdom until 3 or 4 years ago, since when German fuel is finding a market at Bilbao iron works. Average prices ruling in 1893, c.i.f. Bilbao, coal 14*s.* 3*d.* per ton, coke 19*s.* per ton.

PINE TIMBER.

From—	Quantity.			
	1890.	1891.	1892.	1893.
	Cubic yards.	Cubic yards.	Standards.	Cubic yards.
Sweden	65,260	53,737	10,200	47,857
Finland	5,339	5,715	680	6,580
Norway	3,301	4,458	545	2,722
North America ..	5,894	6,634	906	6,870
United Kingdom ..	..	1,179	45	1,586
France	Unknown	14,125	3,165	15,129
Belgium	..	502	2	..
Total	79,794	86,350	15,543	80,744

The falling off in the importation of timber in 1893 was due to the increased custom duty, and also to less demand for house-building purposes. The timber from France consists of boards alone.

Prices of timber at Bilbao in 1893, viz. :—

	Price per Standard.	
	1893.	1892.
	Pesetas.	Pesetas.
Planks	356	320
Battens	266	230
Cut timber floorings	300	250

CODFISH.

From—	Quantity.			
	1890.	1891.	1892.	1893.
	Tons.	Tons.	Tons.	Tons.
Norway	8,918	8,079	8,659	9,318
Iceland	1,782	1,131	1,509	2,412
Scotland	454	528	544	514
France	291	186	77	120
Total	11,445	9,924	10,789	12,364

The importation of Faröe codfish, which now pays equal duties, has considerably increased.

There were imported besides from Norway 1,608 barrels of bait for fishing purposes.

The prices of codfish at Bilbao in 1893 were :—

	Price per Ton.
	£
Norwegian	30
Iceland	29
Scotch	36

Petroleum.

Crude petroleum* imported from the United States of America during the last four years :—

Year.	Quantity.
	Tons.
1890..	6,425
1891..	3,598
1892..	3,278
1893..	4,739

* Price of petroleum at Bilbao in 1893, 20*l.* per ton (507 pesetas); price of gasoline at Bilbao in 1893, 20*l.* per ton (507 pesetas).

TABLE showing other Articles of Importation during the Year 1893.

Articles.		From—						Total in 1893.	Total in 1892.
		Various Countries.	France.	England.	Belgium.	Germany.	Holland.		
Building stones and earths used in arts and industries	Tons	..	12,642	1,864	1,696	61	3	16,266	6,090
Schists and bituminous matter	„	..	231	125	297	42	6	701	608
Glass	„	12*	68	67	201	74	101	523	616
Clay worked up, porcelain, &c.	„	12†	59	1,820	326	20	168	2,405	8,052
Iron castings	„	..	90	713	113	35	24	975	1,686
Iron and steel (forged, rolled, &c.)	„	85‡	130	4,502	1,591	288	209	6,805	7,672
Copper and its alloys	„	..	80	189	36	27	5	337	7,982
Other metals, tin, zinc, &c.	„	..	4	1,301	15	6	1	1,327	800
Drugs	„	10‡	1,551	520	18	755	114	2,968	2,569
Colours, dyes, and varnishes	„	..	68	157	161	31	5	422	607
Chemical and pharmaceutical goods	„	27§	548	1,420	901	1,836	92	4,824	4,587
Starch, soap, paraffin	„	..	6	149	166	300	36	657	Unknown
Raw cotton	„	..	..	4	..	1	..	5	39
Wool, cotton textiles, spun and silk	„	..	24	317	42	4	9½	396½	566¾
Hemp, flax, aloes, and jute	„	3§	213	1,319	31	15	..	1,581	1,341
Wood-pulp (paper paste)	„	2,405‡	..	..	..	..	..	..	1,097
Paper for printing and writing	„	..	4	3	13	9	½	29½	44½
Other papers	„	..	6	31	29	2	¾	68¾	79¼
Cardboards	„	6‡	7	8	31	32	..	84	112
Staves	Number	..	12,400	776,542	1,430	..	..	790,372	158,605
Cut timber and wood for cabinet-ware and furniture	Tons	8‖	19	191	55	50	65	388	149
Charcoal, firewood, cork, &c.	„	2‡	33	3	3	1	..	42	33½
Animal skins and leather	„	20‖	135	21	2	16	4	198	121
„ fats and greases	„	242¶	535	763	1,630	13	..	3,183	2,922

TABLE showing other Articles of Importation during the Year 1893—continued.

Articles.		From—						Total in 1893	Total in 1892.
		Various Countries.	France.	England.	Belgium.	Germany.	Holland.		
Musical instruments	Number..	..	6	1	3	36	..	46	23
Watches and appliances for same	,, ..	.	268	119	694	2,737	187	4,005	4,686
Agricultural implements	Tons ..	3**	95	1,070	486	251	428	2,333	4,899
Carriages, barrows, &c.	,, ..	..	..	2	¼	¼	..	2¼	13
Alimentary substances (meat and fish) ..	,, ..	..	26	83	62	6	..	177	1,165¾
Grains and vegetables	,, ..	13,693§§	216	2,113	28	35	278	16,363	4,247
Fruits fresh and fruits	,, ..	..	3	8	..	..	42	53	..
Colonials	,, ..	2,606‡‡	8	41	20	1	21	2,697 ‖	2,482
Oils and drinks	,, ..	1††	15	56	8	11	58	149	897¼
Seeds, &c.	,, ..	..	15	¼	5		¼	21	194
Preserves, sausages, &c., mustard, cheese ..	,, ..	..	3	6	12	1	125	147	210¼
Sundry (materials, furs, and fancy goods) ..	,, ..	1**	5	88	15	17	9	135	150½

• From Austria. † From Russia. ‡ From Sweden and Norway. § From Italy. ‖ From Porto Rico. ¶ From Norway, 188 tons; from Denmark, 54 tons. ** From United States of America, Norway, and Italy. †† From Cuba. ‡‡ From Cuba, 1,624 tons; Porto Rico, 622 tons; Philippine Islands, 123 tons; Venezuela, 236 tons; Aruba, 1 ton. §§ From Russia, 3,270 tons; Italy, 1,113 tons; United States of America, 8,201 tons; Mexico, 341 tons; Vera Cruz, 18 tons, and Morocco, 50 tons. ‖‖ Colonials imported in 1893, viz., sugar, 650 tons; coffee, 130 tons; cacao, 305 tons; cinnamon, 25 tons; tea, 18 tons; cocoa paste and cream, 24 tons; pepper, 10 tons, &c.

Animals imported at Bilbao in 1893:—

135 cows from Holland, 1 cow from France, 2 pigs from France, 2 sheep from Germany, and 1 dog from England.

Ships bought by Bilbao owners in 1893:—

3 steamers from England, 1 steamer from France, 1 sloop and 5 boats from England.

STATEMENT showing the quantities of Iron Ore exported from the Port of Bilbao during the years 1888–93.

Year.	Quantity.					
	United Kingdom.	Holland.	Belgium.	France.	United States of America.	Total
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons
1888	2,481,335	644,235	103,602	347,687	14,778	3,591,637
1889	2,770,125	640,261	93,010	378,347	3,748	3,885,612
1890	3,040,562	647,980	106,525	388,516	89,335	4,272,918
1891	2,245,613	631,765	66,316	342,163	30,607	3,316,464
1892	2,650,753	766,302	75,249	399,319	34,164	3,918,544
1893	2,999,907	568,739	108,039	329,817	10,463	4,016,965

In addition to the exportation in 1893, 295,567 tons were shipped at small ports on the coast near Bilbao.
The larger quantity of the ore shipped for Holland was for German works.

The exportation of pig-iron is rapidly falling off as may be deduced from the following comparative table:—

COMPARATIVE Table showing Exportation of Pig-iron during the Years 1888–93.

Year.	Quantity.								
	Italy.	Portugal.	France.	Belgium.	Holland.	Germany.	Russia.	United Kingdom.	Total.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
1888	58,755	1,900	5,220	892	9,221	8,780	1,352	100	86,220
1889	54,852	221	2,797	6,608	2,305	6,741	..	5	73,524
1890	29,991	964	5,318	85	8,981	11,030	..	18,949	75,318
1891	29,587	..	15,557	9,004	16,112	11,765	..	14,084	96,109
1892	16,572	100	16,593	10	7,629	7,481	..	13,752	62,137
1893	14,650	..	6,983	980	1,192	7,156	..	1,005	31,966

COMMON Wine.

To—	Quantity		
	1891.	1892.	1893.
	Tons.	Tons.	Tons.
France	1,681	591	293
United Kingdom	396	438	206
Holland..	149	280	274
Belgium..	70	99	66
Germany	80	28	178
Denmark and Norway.. ..	17	1	2
Isle of Cuba	..	..	13
Total	2,393	1,437	1,032

The next table shows other articles of exportation to foreign countries during the year 1893.

TABLE showing other Articles of Exportation to Foreign Countries during the Year 1893.

Articles.		To—							Total in 1893.	Total in 1892.
		France.	England.	Belgium.	Holland.	Germany.	Italy.	Other Nations.		
Building stones	Tons cwts...	3·13½	..	..	..	..	..	..	3·13½	3·9
Sulphate of lime	„ ..	..	4·19½	..	..	..	..	..	4·19½	..
Tar, oil, and turpentine	„ ..	1,262·12	127·18½	340·18	..	0·12	..	..	1,732·0½	832·0
Blende	„ ..	..	100·0	140·0	..	..	..	..	240·0	9·10
Copper ore	„ ..	..	12·0	..	..	..	..	..	12·0	29·6
Forged iron bars	„ ..	11·2	3·3	..	..	..	..	..	14·5	7·19
Tin-plate cuttings	„ ..	..	..	..	45·0	104·0	..	..	149·0	95·0
Old iron rails	„ ..	..	..	..	..	..	300·0	..	300·0	110·0
Iron and steel (worked up)	„ ..	..	..	..	..	1·18½	..	..	1·18½	0·10
Firearms	„ ..	4·15½	14·5	..	..	..	..	..	19·0½	15·4
Quicksilver	„ ..	..	3·9	..	..	..	..	..	3·9	..
Tin ore	„ ..	..	4·4	..	..	..	..	..	4·4	1·0
Lead (worked up)	„ ..	..	1·12	..	..	..	..	..	1·12	..
Zinc bars	„ ..	1·8½	0·8	..	..	..	..	..	1·16½	22·13
Liquorice root	„ ..	0·10½	..	82·4½	..	..	..	..	82·15	34·4
Olive residuum	„ ..	60·11	..	..	..	..	..	..	60·11	8·19
Glue	„ ..	..	..	..	..	0·16½	..	..	0·16½	..
Sulphate of copper	„ ..	58·16	3·18	..	..	..	..	..	62·14	..
„ ammonia	„ ..	594·0	..	..	..	..	..	..	594·0	0·5
Tartaric acid	„ ..	..	16·14	..	..	..	..	..	16·14	..
Sheepskins	„ ..	..	2·5	12·6	..	53·0½	..	..	67·11½	36·3
Swifters and ropes	„ ..	0·7½	..	..	..	..	..	..	0·7½	..
Empty bags	Number ..	41,335	2,408	..	..	..	..	..	..	..
Wool (unwashed)	Tons cwts...	747·3	16·12	15·9½	..	0·2½	..	..	779·7	321·10
Cigarette paper	„ ..	68·2½	1·4	0·2½	..	6·19½	0·18	..	77·6½	123·08
Pasteboard boxes	„ ..	..	0·17½	..	..	..	..	..	0·17½	..

TABLE showing other Articles of Exportation to Foreign Countries during the Year 1893—continued.

Articles		To— France.	England.	Belgium.	Holland.	Germany.	Italy.	Other Nations.	Total in 1893.	Total in 1892.
All sort of timber (not cut) ..	Tons cwts...	0 8½	11 13½	.	206 10	..	..	375 0	593 12	0 14
Wooden furniture	„ ..	0 18	..	..	0 2½	0 9	..	..	1 9½	34 19
„ casks (for packing) ..	„ ..	94 18	64 15½	15 10½	39 3	31 4	..	3 8	248 19	..
Cork sheets	„ ..	5 0½	..	..	..	..	..	..	5 0½	..
„ (in any shape)	„ ..	1 14	..	..	..	..	..	..	1 14	..
Horses	Number ..	..	4	..	..	..	..	..	..	..
Skins (not cured)	Tons cwts. .	4 17	0 3½	..	..	..	..	..	5 0½	14 2
„ (cured)	„ ..	..	0 13	..	..	..	..	..	0 13	0 1
Bones, horns, &c.	„ ..	43 14	..	..	7 4	..	..	..	50 18	102 1
Feathers	„ ..	..	..	..	..	..	..	14 2½	14 4½	2 17
Rags, &c...	„ ..	..	8 13½	..	..	..	..	..	8 13½	..
Machinery	„ ..	..	9 8½	1 6	..	..	..	..	10 14½	27 6
Salted and pressed sardines ..	„ ..	0 0½	17 5	..	0 4	..	1 18½	..	19 8	15 18
Beans	„ ..	0 16	3 17½	..	..	..	..	..	4 13½	3 10
Lentils	„ ..	0 14	41 1	19 16	..	..	..	..	61 11	19 6
Onions	„ ..	..	..	5 15	..	..	..	..	5 15	..
Chestnuts	„ ..	..	10 0	..	88 10½	..	..	..	98 10½	158 0
Ground pepper	„ ..	..	..	..	..	1 10	..	..	1 10	0 2
Olive oil	„ ..	6 4	..	..	..	..	..	..	6 4	6 12
Brandy	Litres ..	231	..	..	..	1,908	..	..	..	..
	Tons cwts...	..	..	..	..	..	..	..	..	0 8
Wine, spirit	Litres ..	144	..	..	..	..	..	..	..	..
	Tons cwts...	..	..	..	..	..	..	..	..	1 4
Liquor	Litres ..	131	..	..	..	..	..	..	..	..
	Tons cwts...	..	..	..	..	..	..	..	..	2 2

TABLE showing other Articles of Exportation to Foreign Countries during the Year 1893—continued.

Articles.		To—							Total in 1893.	Total in 1892.
		France.	England.	Belgium.	Holland.	Germany.	Italy.	Other Nations.		
Xerez wine	Litres ..	1,550	..	..	384	..	..	..	..	..
	Tons cwts...	..	..	..	..	..	..	..	..	1·3
Sweet „	Litres ..	..	1,244	..	..	..	..	..	..	..
	Tons cwts...	..	..	..	..	..	..	..	..	0·9
Bran	„ ..	176·1½	..	..	..	..	..	..	176·1½	..
Preserves..	„ ..	170·10	100·17	9·6	..	14·6	..	7·18	302·17	375·0
Sausages..	„ ..	0·18	..	..	..	..	..	..	0·18	0·7
Hemp slippers	„ ..	..	..	1·11	..	..	..	..	1·11	7·1

TOTAL Amounts of Custom Duties collected at Bilbao during the last 3 Years.

Year.	Amount.
	£
1891..	428,928
1892..	480,017
1893..	486,975

Mining.

Iron ore.

There is no doubt that in Spain there yet exist abundant deposits of minerals, particularly of iron ore, which being far inland remain unworked, partly from want of easy means of conveyance, and partly from want of enterprise.

The total number of the mines registered in Spain is over 15,000, out of which only about 2,000 are exploited.

The province of Biscay, however, still gains very considerable profits from its rich iron ore mines, as may be deduced from the following comparative statement of the approximate total production in Spain :—

	Quantity.	
	1892.	1893.
	Tons.	Tons.
Consular district of Bilbao—		
Biscay	4,200,000	4,600,000
Guipuzcoa	13,560	18,650
Santander	360,000	300,000
Total	4,573,560	4,918,650
Murcia—		
Cartagena and Aguilas.. ..	476,400	360,000
Almeria	170,300	115,000
Malaga	70,000	55,000
Oviedo	60,000	65,000
Navarra	14,910	13,890
Other provinces	40,000	30,000
Grand total in Spain ..	5,405,170	5,497,540

The exportation of iron ore from Bilbao to the United Kingdom in 1893 was over 3,000,000 tons, and, as the total foreign import of iron ores into the United Kingdom was 4,065,863 tons (3,624,083 tons from Spain, and 441,780 tons from other countries), it appears that shipments of Bilbao ores made up 84 per cent. of the importation from Spain, and 75 per cent. of the total foreign importation of iron ores into the United Kingdom in 1893; and,

calculating the yearly production of iron ores in the United Kingdom to be 14,000,000 tons, it would appear that Bilbao supplies about the fifth part of the iron ores yearly consumed in the United Kingdom.

With regard to the output of iron ore in Biscay, and the very considerable quantities exported for the last 16 years at the rate of 3,000,000 tons to 4,000,000 tons per annum, the question has often been raised as to how long the mines may be expected to continue this yield. This is certainly a matter very difficult to forecast, but it may be observed that the number of mines yielding good quality ores is becoming smaller, with the inevitable result that in the course of time the exportation will decrease and the quality deteriorate.

Form of the mines.

The forms of the iron ore deposits in the province of Biscay are simple and practically on the same geological horizon, a circumstance which adds materially to a ready comprehension of them. They are bedlike in form generally; and appear with an exposed surface, or simply covered by shale, or overlaid by heavy beds of limestone.

The deposits are all quarried, and for quarrying operations the explosives used are powder and dynamite.

Accidents.

The number of men employed in the working of the iron ore mines in the province of Biscay is estimated at 12,000; the accidents whilst working averaging $3\frac{1}{2}$ to 4 per cent. per annum.

The number of mines worked in the province of Biscay is 90, the following being the principal and the approximate quantities extracted from them in 1893:—

LIMONITES or "Rubio" Ores.

SOMORROSTRO DISTRICT.

Name of Mine.	Quantity.
	Tons.
Orconera 558,243	
Concha 158,855	
Carmen 155,404	
Mame 44,365	
	916,867*
Union y Amistosa	619,459
Conchas, Nos. 3, 7, 8, and "Barga" ..	305,383
Demasia San Antonio	170,077
Demasia San Benito	159,344
Rubia	151,148
"Paquita," "Julianas," "Cerrillo," and "Pickwick"	125,214
"Confianza" and "Petronila"	123,567
"Begoña Demasia," "Catalina," and "San José"	118,207
"Julia" and "Adela"	112,250
"Elena"	75,903
"Esperanza" y "Buena Fortuna" ..	45,342
"Ynocencia" y "Demasia"	41,800
"Demasia Javier" and "Marta" ..	35,525
"Demasia Precavida"*	20,914
"San Severino"	17,086
"Demasia Justa"	12,660

* Worked by the Orconera Iron Ore Company, Limited.

GALDAMES DISTRICT.

Name of Mine.	Quantity.
	Tons.
"Berango," "Escarpada," and "Tardia"	120,349
"Catalina"	68,939
"Pepita Dolores" "San Juan"	48,180
San Antonio	18,170
Rita Adelaida	8,387

BILBAO DISTRICT.

Name of Mine.	Quantity.
	Tons.
"Malaespera"	128,609
"Felicidad Aurora"	125,673
"Gustavo San Luis"	83,875
"Primitiva"	43,459
Ntra Srã Begoña	48,229
"Silfide" and "Diana"	34,962
Hematites	29,827
San Prudencio	7,083

Hematites or Campanil Ore.

Somorrostro District.

Name of Mine.	Quantity.
	Tons.
"N. S. de Begoña"	153,463
"Altura," "San Bernabe"	49,882
Socorro	39,289
Cesar	28,443
Indiana	27,096
Esperanza San Ygnacio, Buena Fortuna	10,246
Trinidad	5,801

The consumption of ore by the three iron works at Bilbao has been decreasing, as may be compared by the following statement:—

Works.	Quantity.			
	1890.	1891.	1892.	1893.
	Tons.	Tons.	Tons.	Tons.
Vizcaya Company ..	189,626	187,946	152,059	157,938
Altos Hornos Company	166,685	136,010	.. *	116,741
San Francisco Company	139,368	90,193	.. *	100,176
Total	495,682	414,149	..	374,855

* Could not be ascertained.

Taxes on mining.

The Government taxes on mining in the province of Biscay amounted in the year 1893 to the sum of 12,400*l.*, viz., annual superficial canon, 4 pesetas (3*s.*) for every 11,881 square yards; tax on extraction, 2 per cent. upon the value of the ore.

Bilbao mine proprietors are looking about in other iron ore districts in Spain. Some of them are engaged in the opening of large mining property in the province of Santander, where they are putting up washing machinery for concentrating the ore, and others have begun developing mines in the provinces of Almeria and Seville.

Coal.

A very important railway line from Bilbao to La Robla, 176 miles in length, will be opened in the month of July next for the purpose of conveying coal to Bilbao from the deposits in the provinces of Leon, Asturias, and Palencia, hitherto not available in consequence of the distance from the coast. This railway, which is wholly constructed with Bilbao capital, is specially for the transport of coal, which it is believed will compete in price and quality with the English coal hitherto commanding the Bilbao market.

Very important mines are at present in course of exploitation, and are expected to yield largely.

With regard to the quality of the native coal, it is reported that it burns too quickly, and is not so clean as English, and with respect to price the following comparative note shows the future approximate cost of coal at Bilbao, viz. :—

ENGLISH COAL.

	Per Ton.
	Pesetas c.
Price c.i.f., Bilbao, 14*s.* 6*d.*, at exchange, 30·50 pesetas per 1*l.* = ...	22 11
Custom duties	2 50
Cost, f.o.b., Bilbao	24 61

NATIVE COAL.

	Per Ton.
	Pesetas c.
Coasting—	
Price at port of shipment	18 0
Freight from Gijon to Bilbao	5 50
Cost, f.o.b., Bilbao	23 50

	Per Ton.
	Pesetas.
By railway—	
Price on railway trucks	13¼
Conveyance to Bilbao	8
Cost on railway trucks at Bilbao works	21¼

One of the advantages of the railway over the sea transport will be that the coal will be promptly delivered in small quantities, and within a short notice. The fare for transporting coal by the Robla Railway will be reduced to 5 pesetas per ton when intended for exportation.

Bilbao, Barcelona, and Cartagena are the principal markets for English coal in Spain, consuming one-half of the total importation. The quantity of English coal imported into Bilbao represented in bulk one-fifth of the total importation (see page 6).

The consumption of Spanish coal at Bilbao conveyed coastwise from Gijon (Asturias) is gradually increasing, as may be seen by the following statement :—

Year.	Quantity.
	Tons.
1888..	28,533
1892..	68,429
1893..	73,231

The principal consumers of Spanish coal in 1893 at Bilbao were Altos Hornos Iron Works, 28,368 tons; Vizcaya Co. Iron Works, 6,570 tons; Mudela Co. Iron Works, 3,440 tons; Iberia Co. Tin Works, 10,200 tons; Gas Lighting Works, 3,290 tons.

The following is the approximate production of coal in Spain:—

	Quantity.	
	1892.	1893.
	Tons.	Tons.
Oviedo (Asturias)..	781,620	810,000
Palencia	148,204	149,850
Leon	25,000	30,000
Cordova	250,000	310,000
Sevilla	106,218	103,660
Ciudad Real	79,000	88,000
Gerona	34,143	40,000
Total	1,424,185	1,531,810

The approximate output of other minerals within the consular district of Bilbao has been as follows:— Minerals.

Articles.		Quantity.	
		1892.	1893.
		Tons.	Tons.
Calamine and blende zinc ores ..	Santander ..	31,600	28,000
	Biscay	1,702	4,203
	Palencia	718	..
	Guipuzcoa ..	80	1,500
Lead ores	Guipuzcoa ..	1,829	1,450
	Biscay	..	170
Lignite	Guipuzcoa ..	14,890	11,000
	Santander ..	700	550
Hydraulic cement	Guipuzcoa ..	49,808	32,775
Common salt	Burgos	7,754	2,000
	Logroño	68	600

Industries.

A violent reaction has taken place amongst Bilbao ironmakers and ironmongers, who are agitating with vigour in commercial, industrial, and political circles with the view of securing the preservation of the existing protective tariff on imported goods.

A grand meeting of the representatives of the principal industries in Spain was held here in the month of December last, at which a protest was signed against the projected commercial treaties with foreign countries, especially with Germany and the United Kingdom, and it was determined that steps be adopted for the formation of central and kindred local associations, whose object should be the promotion of a still more drastic system of protective duties.

This reaction on the part of Bilbao people is, perhaps, on account of considerable investments lately made in new industries, subscriptions for which promptly filled up where the prospects were encouraging, and they now naturally desire to favour the development of the existing industries, and to stimulate the introduction of new ones into Spain by excluding foreign competition.

We will not here pretend to determine how this restrictive policy would affect the agriculture and the general interests of the country, but for the sake of commerce it is to be hoped that whatever policy may be adopted it will be allowed to remain settled upon a fixed basis.

The province of Biscay continues at the head of the iron industry in Spain, which may be properly described as limited to this and the province of Oviedo (Asturias).

In spite of the high protective tariff the production of iron and steel does not greatly increase. This is owing to the small home consumption. Great efforts are being made to obtain from the Government an increase in the duties on railway material, which is still imported, favoured by a special tariff, chiefly in the southern and eastern provinces. The importation of railway material at Bilbao in 1893 by the favoured tariff was 545 tons.

Iron making.

There are three principal iron works at Bilbao, viz. :—

	Number of Blast Furnaces.
The Altos Hornos Company, possessing ..	3
Vizcaya Company, possessing	3
San Francisco Company, possessing ..	4

Each of the Altos Hornos furnaces produces about 600 tons per week; those at Vizcaya 700 tons per week; and the San Francisco furnaces yield 300 tons per week.

The annual capacity of production of the three works being 260,000 tons of pig-iron.

The arrangement of the plant and the design of the furnaces are in accordance with the most advanced theory and practice, every available modern improvement and powerful appliances for the handling of large masses having been introduced. There are also cogging and finishing mills, puddling furnaces, &c. The Altos Hornos and the Vizcaya works produce plates, iron bars, castings, forgings, building material, such as girders, beams, pillars, &c.

Steel making.

The Altos Hornos in the year 1885, and the Vizcaya in 1889, introduced the Bessemer, Robert, and Siemens processes of steel making.

The Altos Hornos plant comprises two 10-ton Bessemer converters, and one 10-ton Siemens open hearth furnace. The Vizcaya have five 5-ton Robert converters, and four 12-ton Siemens open-hearth furnaces, supplied with gas by 16 producers.

They produce structural shapes, plates, rails, mild steel, tin-plate, bars, &c.

The following was the general production at the three works during the year 1893 :—

Works.	Pig-Iron.	Siemens Steel.	Bessemer Steel.	Robert Steel.	Puddler.	Rolled.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
Altos Hornos Company	92,300	5,000	30,000	...	8,000	35,000
Vizcaya Company...	99,127	16,898	...	10,436	4,294	24,567
San Francisco Company ...	28,000	...	...	...	...	...
Total ...	219,427	21,898	30,000	10,436	12,294	59,567

Charcoal iron.

Charcoal iron is produced by the Santa Ana Bolueta Company to the extent of 3,000 tons to 4,000 tons per annum, and also by Messrs. J. Jauregui and Sons at Amorebiata. They make good quality iron bars, armatures, hoops, general and ornamental castings, &c.

Coke.

The Vizcaya Iron Works have 144 coke ovens (Carves system), which produce from 250 tons to 300 tons per day for their own consumption. The San Francisco Works built last year 28 coke ovens (Coppee system) producing about 100 tons per day. The total production of coke at both works in 1893 was :—

	Quantity.
	Tons.
The Vizcaya Company	86,790
San Francisco Company	36,000
Total	122,790

Metallurgical industries.

The attention of the principal iron producers at Bilbao was particularly directed towards promoting and implanting different

metallurgical industries where their produce might find a more secure and easier market. Among those that were established a few years ago, and have successfully increased their production, the following are the principal:—

The Aurrera Factory, making cast-iron and cast-steel, tubes, wagon frames, and steel castings generally.

The Talleres de Zorroza have a boiler shop and foundry. They use about 2,500 tons of iron per annum chiefly for boilers, bridges, cranes, building structures, &c.

The Talleres de Deusto manufacture from Robert and Bessemer steel forgings and very fine steel castings, which are subjected to a rigid test, having perfect hard faces.

The Sociedad Vasco-Belga at Miravalles make bridges, railway wagons, and project the making of locomotive engines and railway material.

The Sociedad Santa Agueda produce iron bars and horse-shoe nails.

The managers of the above works report that the uncertainty prevailing during the year 1893 about the conclusion of the commercial treaties with foreign nations was the cause of their not having a larger number of orders.

There exists besides, near Bilbao, a considerable number of iron and engineering shops and foundries, some of them devoted to the repairs of ships, and the other to the casting of industrial and building requirements, the principal being John K. Moffat, Averly and Co., Augustin Cortadi, John Robertson, Sagarduy and Co., Hijos de Roldan, A. Bravo, Jose Aranburu, M. Corral, Muguruza and Co.

Very important new metallurgical works are now in course of construction for the making of forged tubes, wire, and the manufacture on a large scale of needles, pins, and safeties, &c., which will be the first industries of the kind in Spain.

Tin-plates.

The tin-plate industry was inaugurated in Spain by the Iberia Company, these works now producing nearly 100,000 boxes per annum. They use bars from the Vizcaya Company. The total present consumption of tin-plates in Spain is calculated to be 150,000 boxes.

A new company, the Basconia Company, have now large works in course of construction, and will commence operations within a few months. It is anticipated that these two manufactories will amply meet the consumption of Spain for a few years.

COMPARATIVE Return of the Firearms made in this District during the Years 1889–93.

Year.	Fowling Pieces.	Pistols.	Revolvers.	Guns.	Cartridges.
	Number.	Number.	Number.	Number.	Number.
1889..	31,338	46,031	56,370	4,458	170,357
1890..	34,551	47,544	67,664	2,661	116,649
1891..	39,004	51,257	65,434	1,345	247,578
1892..	40,967	50,481	66,101	3,653	231,175
1893..	48,174	46,587	69,395	3,886	163,065

A considerable number of fire-arms are exported for Central and Southern America.

Delta metal. This alloy was introduced into Spain by the Delta Español Company for the making of cartridge cases, ornamental and machinery pieces, bells, &c. They also make copper plates.

Lead and tin metals. A company has recently been formed under the name of "Estaños and Plomos laminados" for the smelting and rolling of lead and tin, projecting chiefly the making of capsules for bottles, lead paper, &c.

Copper. Ingots are imported for the making of plates, domestic utensils, pieces of machinery, and ornamentation, &c., at the works of Messrs. Pradera and Power, Aguirre Sarasua and Co., Mendivil and Co., and others.

Petroleum. Crude petroleum is imported from the United States in tank-steamers, and distilled at Messrs. Gurtubay and Fourcade's works to a density of 180 grammes per litre of rectified petroleum. A syndicate has been formed with the object of keeping the price up to an agreed standard. Price quoted at Bilbao, 20*l.* per ton.

Dynamite. Made by the Sociedad Española de Dinamita, the Sociedad Vasco-Asturiana, and Fabrica de Burceña Erhardt, which meet almost the whole requirements in Spain. They have formed a syndicate for the purpose of paying a lump sum to the Government so that they may have the monopoly of the market. Price at Bilbao, 42½ pesetas per box (1*l.* 9*s.*).

Nitromita. A company has been formed with the object of erecting a factory at Zaramillo, near Bilbao, for the production of this explosive.

Chemical works. Messrs. Burt, Bolton, and Haywood, of London, erected a few years ago a chemical factory for the treatment of coal-tar, and extraction of various dyes and products (benzols, &c.).

Messrs. Errazquin and Co. have very important chemical works, where they produce on a large scale sulphuric acid, for the making of dynamite, and for the petroleum and tin-plate works, &c. They also make nitric acid, hydrochloric, nitrate of ammonia, distillation of glycerine, sulphate of sodium, of iron, of copper, and of alumine, alum, and artificial manure.

Paper mills. In addition to the important paper mills existing in this and the province of Guipuzcoa, two new mills have lately been estab-

lished near Bilbao, which are considered to be the largest in Spain. The machinery is much improved, and the arrangement is good; they consumed about 2,700 tons wood-pulp in 1893. Another paper-mill is in course of construction in this province.

Building materials. Tiles, bricks, lime. Saw mills.

There are three brick factories supplied with good appliances, which have had a brisk period in the active construction of dwelling-houses in town and in the working districts. The saw mills, timber yards, lime kilns, &c., have also been well employed.

Glass.

A company was started here some 2 years ago for the production on a large scale, which, owing to unknown difficulties, has suspended operations.

Cement.

Several factories exist at Zumaya, and other places near Bilbao, the total production of which may be estimated at 50,000 tons per annum.

Jute spinning mill.

There is a factory near Bilbao which imports the raw material (about 700 tons per annum) from Manila (viâ Liverpool); the yarn being used in the many important slipper, sack, and fuse factories, busily at work in these provinces.

Slipper, sack, and fuse.

Woven textiles.

In addition to the several factories already existing in the province of Guipuzcoa, another important one is now in course of construction in this province for the making chiefly of Basque caps (boinas).

Flour mills.

Messrs. Coste y Vildosola, the Ceres Co., the San Cristobal Co., Jose M. Gonzalez and Co., J. de Yrala and Co.

Soap and candles.

There are three new factories with good machinery.

Factory system.

The factory system has largely developed, and a great number of agricultural labourers have been drawn into town from the small villages in this province and other parts of Spain.

Women and girls are employed in a large proportion.

Fortunately, up to the present, few difficulties have been raised between capital and labour.

The number of unemployed is small in this district.

Wages.

Wages continue moderate, viz., varying from 2*s.* to 4*s.* for men, 1*s.* 6*d.* for women, and 1*s.* for boys. Workmen are rapidly becoming very skilful in executing fine pieces of art, as well as in the handling of labour-saving contrivances.

Artisans' education.

There exist in Bilbao town and neighbourhood four voluntary and free artisans' schools, where the usual elementary and advanced stages of learning, including engineering, carving, modelling, &c., are taught during the evenings. The number of pupils attending is approximately 2,000.

Associations.

Co-operative and insurance associations are now becoming more popular.

Taxes.

Industries are free from taxation in the Basque provinces.

Railways.

In view of the very satisfactory dividends paid by some of the railways in the province of Biscay a few years ago, capital has since been always prompt to support the opening of new lines,

there being no doubt that in the course of a short period the whole province will be intersected by a close net of lines.

The total extension of those already opened is 167 miles, the relative importance of which being an inducement for the compilation of the following comparative statement:—

Countries.	Length of Line in Miles.	Square Miles of Territory.	Length of Line per 100 Square Miles of Territory.	Number of Inhabitants.	Length of Line per 10,000 Inhabitants.
Biscay	167	835	20	235,800	7·08
Spain	6,127	198,404	3·09	17,545,000	3·49
Germany...	25,969	208,672	12·44	48,512,000	5·35
France	22,586	204,155	11·06	38,219,000	5·91
Great Britain and Ireland ...	19,939	121,436	16·42	38,584,000	5·17
Belgium	3,215	11,387	28·23	6,094,000	5·28
Sweden	4,915	173,932	2·83	4,774,000	10·30

On examination of the component parts of this average it will be found that with the exception of Belgium, which is at the head in reference to the mileage of railway open relatively to territory, and Sweden, having a larger mileage relatively to the number of inhabitants, the province of Biscay takes a prominent position.

Public Works.

In the year 1889 a large stone breakwater was commenced outside the port of Bilbao, starting at Santurce on the west side of the bay, and running on towards the east. When finished it will afford a very important anchorage and port of refuge protecting ships from the westerly and north-westerly winds and seas. **Breakwater.**

The measurements of the structure will be about 1,640 yards in length. The breakwater consists of two parts; one 1,039 yards in length, and the other 546 yards in length forming an angle of 165 degrees. It is being constructed on a foundation made of rubblestone thrown into the bottom of the sea, reaching a level of 19½ feet below low water at spring tides; this foundation is 87½ yards in breadth in the bottom, and 59 yards on the top. On the top of this, huge blocks of concrete measuring 58¼ cubic yards (50 tons each), which are made at the works laid down at Axpe, are placed in positions by pontoons, the holes or spaces left between the blocks being filled up with rocks for the purpose of rendering it perfectly strong. The main body of the breakwater is constructed of blocks on the exterior facings to a height of 23 feet above low water at spring tides; the width will be 33 feet on the top.

It is doubted by some whether the base of the breakwater is not too small, and that it is too narrow in section to stand with impunity the impact of the gigantic and heavy waves that roll periodically into the Bilbao Bay.

Owing to the terrific violence of the waves washing against the part of the breakwater already constructed, during the gales of the

month of November last, it suffered very extensive damages, the repair of which will not be completed until the end of the summer this year.

The contract for the construction of the breakwater was made for the sum of 20,500,000 pesetas (about 800,000*l.*); and the date for the completion of the work is October 16, 1900. The breakwater already proves a slight protection to vessels in bad weather, and it affords great shelter to ships loading at Portugalete during the prevalence of heavy gales.

In December last, a contract was entered into for the building of another arm from the land side between Las Arenas and Algorta, the cost of same to be 8,500,000 pesetas (344,000*l.*), and to be completed within 8 years. The same material will be used as that now being put into the breakwater in course of construction.

The anchoring space between the breakwater and the Portugalete pier will be about 500 acres, having a depth of water between 8·20 fathoms and 2·73 fathoms. The port after these improvements are made will be without its equal among the artificial harbours in Spain.

The improvements are being carried out by the Bilbao Harbour Trust, under the management of the eminent and energetic Spanish engineer Señor Don Evaristo de Churruca, and the funds are raised by levying duties on tonnage entering and leaving the port, viz. :—

INWARD CARGOES.

Description.	Per Ton.
	Pesetas c.
From America—	
Foreign flag	2 50
Spanish flag	0 75
From European ports—	
General cargo	1 25
Coal	0 25
From Coastwise—	
General	0 75
Coal	0 25

OUTWARD CARGOES.

Description.	Per Ton.
	Cents.
On any cargo (excepting iron ore coastwise)	50
Iron ore coastwise	375

These duties are in addition to the navigation dues leviable by the customs.

The total sum expended between the years 1878 to 1893 for the improvements of the bar and river and for the breakwater

(see previous reports by Mr. Consul Young) amounted to 21,000,000 pesetas (about 840,000*l.*); but this may be taken as a profitable expenditure, considering the fact that the British ships entering this port in the year 1878 averaged only 586 tons each, whilst those of 1886 came up to the average of 1,101 tons, and in 1893 to 1,336 tons per vessel. In the year 1878 ships were only allowed to load to 14 feet 6 inches, and this was on the top of spring tides; at the present date vessels load at the springs to 21 feet 6 inches. The freights then were 18*s.* per ton to 20*s.* per ton; the freights now are 4*s.* 4*d.* per ton to 5*s.* 4*d.* per ton.

It is generally thought here that upon the completion of the breakwater, the Spanish Government will make the port a naval station, and that owing to the splendid facilities that will be available there will be developed a large colonial and transatlantic trade.

Sanitary Condition of Bilbao.

The sanitary condition of Bilbao leaves much to be desired, principally owing to defective drainage into the river, which at low tide is almost dry at some places. Many of the old houses have no traps and a good many are faulty, and above all, the working people live closely crowded in small dwellings wanting light and ventilation. The subsoil of Bilbao is composed of clay, which being impervious does not allow the surface water to percolate. As the town lies in a hollow surrounded by hills, it is naturally very damp.

The municipality had proposals from Spanish and foreign engineers in the year 1892 for the sanitary improvement of the river. The proposal accepted was one presented by a Spanish engineer whose scheme was to make a long drain from Bilbao to the sea off Galea Point 10 miles to 12 miles in length, with two pumping stations on the way and five collecting tanks; the estimated cost being 4,660,063 pesetas (about 186,400*l.*). The municipality are now in doubt whether to carry out this project or to apply instead the new electrolytic process invented by Mr. Hermite, which is said to give good results elsewhere. Therefore, although the matter is pressing from a sanitary point of view, the municipality experience much difficulty in deciding which scheme is likely to be the most suitable and economical.

Potable water

The Bilbao potable water is of a very fair quality and was pure even during the epidemics.

The river water, which is now used of necessity in all houses for washing purposes, is really the dangerous medium of contagion, and it may be questioned whether in time of epidemic the supply should not be stopped, because the poorer classes often use it for drinking purposes.

Mortality.

The mortality at Bilbao in 1893, excluding deaths from cholera, was 38 per 1,000.

The number of cases of cholera in 1893 were:—at Bilbao, 408 cases, 213 deaths; in the province, 695 cases, 223 deaths; among which 3 were British subjects, of whom 2 died.

Shipbuilding Yard.

Description.

Astilleros del Nervion. These works, which are situated about 2 miles from the mouth of the River Nervion, were founded by the Anglo-Spanish firm Martinez Rivas-Palmer, in November, 1888.

They consist of a shipbuilding yard, engine works, and gun factory, having an approximate total area of 172,500 square metres (204,947 square yards), and include a dry dock 470 feet by 73 feet with depth of water on sill at spring tides of 22 feet 6 inches, mean tides 20 feet 6 inches, and neap tides 18 feet 6 inches.

Each of the departments is equipped with the most modern machinery and appliances, including large sheer legs capable of lifting 100 tons.

The engine works are managed by Mr. James McKechnie (late of Messrs. J. and G. Thomsons, Clydebank), and the shipyard by Mr. J. S. Clarke (late of the Barrow Shipbuilding Company).

Messrs. Martinez Rivas-Palmer made a contract with the Spanish Government in June, 1889, to build 3 twin screw-belted cruisers of the following dimensions:—

Length over all	Feet	364
„ between perpendiculars	„	340
Breadth	„	65
Depth moulded to upper deck	„	38
Displacement at 21′ 6″ draught	Tons	7,000
Speed with natural draught	Knots	18
„ forced „	„	20
I.H.P., natural draught		9,000
„ forced „		13,000

ARMAMENT.

Two 28 c/ms. guns mounted in barbettes.
Ten 14 c/ms. guns.
Two 7 c/ms. guns.
Eight 57 m/ms. Nordenfelt guns.
Two 11 m/ms. „ „
Eight Hotchkiss Q.F. guns.
Eight torpedo tubes.

It was originally intended to construct the machinery at Palmer Works, Jarrow-on-Tyne, but on the appointment of Mr. McKechnie as engineering manager, it was agreed, on his proposal, that he should not only design the engines but undertake their construction at Bilbao. Workshops were therefore designed and erected under his direction, which for completeness and equipment are said to equal the finest establishment of the kind in England.

The first of the three cruisers was launched in August, 1890, the second in July, 1891, and the third in October, 1891. They are named respectively "Infanta Maria Teresa," "Vizcaya," and "Almirante Oquendo."

In January, 1891, the firm of Martinez Rivas-Palmer was con-

verted into a limited liability company under the title of "La Sociedad Anonima de los Astilleros del Nervion." The engine works were completely destroyed by fire in May, 1891, during the construction of the machinery for the "Infanta Maria Teresa," many parts of which were spoiled and had to be renewed.

Owing to difficulties which arose between the Sociedad Anonima and the Spanish Government, the works were closed in May, 1892, the Government afterwards seizing the works and undertaking the completion of the cruisers at the expense of the Sociedad, under the same technical management.

Trials. The official trials of the "Infanta Maria Teresa" took place at Ferrol in September, 1893, and the engine works manager is to be congratulated on the excellent results obtained, all of which were in excess of the contract. The speed obtained on the natural draught trial was 18·5 knots with 9,560 i.h.p., and on the forced draught trial 20·25 knots with 13,750 i.h.p.

Foreign labour. In the construction of these cruisers, only from 12 per cent. to 15 per cent. of skilled foreign labour was employed, although the contract with the Government allowed up to 25 per cent. Taking this into consideration together with the many drawbacks which had to be fought against during the progress of the work, both Mr. McKechnie and Mr. Clarke deserve great praise for having brought their labours to such a successful issue.

Future of shipyard. It is to be regretted that the future of this splendid works is so uncertain after the above cruisers are completed. Owing to the great cost of iron and steel material in Spain they will not be able to compete with foreign yards in the building of merchant ships, unless indeed the Spanish Government awards a special bonus to the merchant shipbuilding industry.

RETURN of all Shipping at the Port of Santander during the Year 1893.

ENTERED.

Country.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Great Britain ...	2	320	102	72,168	104	72,488
Spain	10	5,810	112	223,920	122	229,730
France	...	...	80	106,393	80	106,393
Sweden and Norway	11	3,253	37	13,375	48	16,628
Germany	...	...	33	15,185	33	15,185
Belgium	...	...	8	5,794	8	5,794
Holland	...	...	2	1,977	2	1,977
Greece	...	...	1	1,700	1	1,700
Total	23	9,353	375	440,512	398	449,895

CLEARED.

Country.	Sailing		Steam		Total	
	Number of Vessels	Tons.	Number of Vessels	Tons	Number of Vessels	Tons.
Great Britain	2	320	102	72,108	104	72,428
Spain	8	4,480	96	204,448	104	208,928
France	...	...	80	109,393	80	109,393
Sweden and Norway	11	3,253	37	13,373	48	16,626
Germany	...	...	33	15,786	33	15,786
Belgium	...	...	8	5,794	8	5,794
Holland	...	...	2	1,977	2	1,977
Greece	...	...	1	1,769	1	1,769
Total	21	8,053	359	421,040	380	429,093

RETURN of Principal Articles of Export from Santander during the Years 1893–92

Articles		1893.		1892.	
		Quantity.	Value.	Quantity.	Value
			£		£
Flour	Cwts.	...	...	2,258	18,106
Ores	Tons	97,500	35,100	81,674	44,800
Wines	Gallons	800,100	96,000	1,178,530	324,412
Alimentary substances	Cwts.	70,000	439,600	86,360	459,342
Other articles	...	...	40,000	...	57,262
Total	...	...	640,700	...	886,622

RETURN of Principal Articles of Import at Santander during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Stone, marble	Tons ...	320	4,000	290	3,400
Coal and coke	,, ...	50,161	60,000	63,123	67,870
Pitch and tar	,, ...	5,304	20,966	4,299	16,988
Petroleum	,, ...	23,877	191,223	7,984	60,876
Glass	Lbs. ...	279,879	5,380	382,953	9,810
Earthenware	,, ...	116,356	3,700	86,246	3,080
Iron and steel manufactures	Tons ...	3,697	41,100	10,019	90,922
Brass and its alloys ...	,, ...	56	9,140	147	12,045
Other metals	,, ...	109	15,072	250	13,230
Railway material ...	,, ...	729	3,400	18,722	70,733
Chemicals	Lbs. ...	2,347,227	19,800	5,843,984	21,739
Colours, dyes, and varnishes	,, ...	863,924	13,080	837,900	15,316
Perfumery, starch, and stearine	,, ...	1,052,905	21,300	763,997	15,660
Cotton—					
Raw	,, ...	670,020	5,000	108,166	949
Thread	,, ...	57,743	4,600	22,515	2,020
Textiles	,, ...	133,580	15,000	219,584	27,940
Flax and hemp yarn ...	,, ...	566,115	40,000	1,143,856	101,922
Linen manufactures ...	,, ...	55,140	6,000	99,009	10,749
Woollen ,, ...	,, ...	242,090	58,000	371,959	101,975
Silk ,, ...	,, ...	4,239	12,600	5,896	10,679
Paper and its applications	,, ...	346,145	12,700	471,390	17,175
Woods, fine	,, ...	229,355	4,000	790,777	2,016
Deals	Cub. metres	26,000	57,200	40,585	72,892
Furrier's wares	Lbs. ...	304,629	22,200	110,744	30,656
Tobacco	Cwts. ...	136,000	168,575	150,966	187,071
Machinery	Lbs. ...	3,478,863	103,000	779,500	128,228
Animal fats	,, ...	662,000	21,000	285,276	7,263
Alimentary substances		3,662,070	111,400	1,802,706	57,580
Grain	,, ...	1,600	10,000	2,000	10,600
Dried codfish	Tons ...	15,617,348	162,497	14,003,880	154,461
Fancy goods and oil-cloths	Lbs. ...	450,000	11,200	199,000	10,180
Alcohol, wine, and beer	,, ...	18,685	10,121	99,020	12,790
Other articles	Gallons ...	...	...	...	...
Total	...	...	1,248,254	...	1,353,025
Spanish colonies and South America ...	...	...	896,000	...	1,032,477
Grand total ...	...	...	2,144,254	...	2,385,502

TABLE showing Total Value of all Articles Exported from and Imported to Santander from all Foreign Countries during the Year 1893, compared with the Year 1892.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	39,750	31,708	337,772	552,013
France	4,230	21,499	112,638	71,238
Belgium	900	..	117,178	185,368
Germany	2,560	..	58,412	78,822
Holland..	..	8,000	..	..
Denmark	..	..	12,600	..
Italy	3,600	5,940	..	2,080
Sweden and Norway ..	45	..	197,952	205,900
United States	..	..	..	259,595
Total	51,085	67,147	1,248,254	1,353,016
Spanish colonies and South America ..	549,615	819,475	896,000	1,032,477
Grand total ..	600,700	886,622	2,144,254	2,385,493

COMPARATIVE Table showing the Relative Importance of the Quantities of Merchandise Exported to Santander from European Countries during the Year 1893.

Articles.		Great Britain.	France.	Belgium.	Germany.	Norway.
Pitch	Tons ...	3,493	2	7	165,540	...
Glass	Lbs. ...	18,960	65,482	82,282	165,540	2,647
Earthenware ...	,, ...	59,870	15,202	32,881	11,447	...
Iron manufactures	Tons ...	1,957	68	1,140	630	..
Brass and its alloys	,, ...	10	9	31	6	...
Other metals ...	,, ...	72	16	18	3	...
Colours, dyes, and varnishes ...	Lbs. ...	214,522	216,533	357,947	74,922	...
Chemicals	,, ...	888,627	788,430	607,033	162,137	...
Perfumery, starch, &c.	,, ...	90,555	14,436	574,113	373,972	...
Cotton—						
Thread	,, ...	57,743	...	...	...	...
Textiles	,, ...	125,450	6,335	968	845	..
Flax and hemp yarn	,, ...	553,360	235	12,500	..	...
Linen textiles ...	,, ...	50,467	..	4,420	250	..
Woollen textiles ...	,, ...	183,196	2,320	21,717	34,857	...
Silk textiles ...	,, ...	2,820	300	322	797	...
Paper and its applications ...	,, ...	105,735	11,670	53,970	174,770	...
Furrier's wares ...	,, ...	3,525	294,832	3,505	2,967	...
Machinery	,, ...	1,339,496	617,367	1,240,000	282,000	
Alimentary substances	,, ...	1,734,736	1,044,204	463,930	420,000	...
Dried codfish ...	,, ...	788,542	788,649	...	...	13,801,200
Alcohol, wine, and beer	Gallons ...	7,108	9,900	1,270	407	..

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SPAIN.

MADRID.

Sir H. Drummond-Wolff to the Earl of Kimberley.

My Lord, *Madrid, May* 15, 1894.

I HAVE the honour to transmit herewith a Memorandum drawn up by Sir George Bonham from the Custom-house Returns of the Imports and Exports of Spain during the first quarter of 1894, compared with those of the corresponding periods in 1892–93.

I have, &c.

(Signed) H. DRUMMOND WOLFF.

Memorandum on the Custom-house Returns of the Imports and Exports of Spain during the First Quarter of 1894, *compared with those of the Corresponding Periods in* 1892–93.

ABSTRACT of Contents.

	PAGE
Imports according to classes of tariff	1–6
Table of imports..	7
Table of exports..	8
Export of wine	9

The following statement taken from the monthly returns issued by the Spanish custom-house gives the total value of imports and exports during the first quarter of 1894, and enables a comparison to be drawn with the imports and exports during the corresponding period of the two preceding years.

Details. Except as regards Class XII. (alimentary substances) no details are given respecting the countries of origin or destination. In order to avoid unnecessary repetition the value of exports, which will be found in Table 2, are not given separately, as has been done with regard to imports, but some further tables are given throwing light upon the wine trade.

Exchange. The values are given in currency and sterling at the par rate of exchange, *i.e.* 25 pesetas to the 1*l*.

The statistics are arranged in accordance with the classes of the tariff.

Class I.—Stones, Earthy matters, Minerals, Glass, Earthenware, and Pottery.

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
1892	22,011,245	880,449
1893	19,369,467	774,778
1894	20,151,221	806,048

In this class the imports of coal and coke decreased from 454,717 tons in 1893 to 453,734 tons in 1894.

Class II.—Metals, and Manufactures into which Metal enters.

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
1892	8,453,894	338,155
1893	5,872,374	234,894
1894	6,785,904	271,436

Class III.—Substances Employed in Pharmacy, Perfumery, and Chemical Industries.

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
1892	16,300,032	652,001
1893	11,874,884	474,995
1894	13,543,677	541,747

Class IV.—COTTON and its Manufactures.

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
1892	30,152,851	1,206,114
1893	28,508,872	1,140,354
1894	34,678,920	1,387,156

The increased importation is mainly in the raw materials, and, therefore, indicates the development of Spanish manufactures.

Class V.—HEMP, Flax, Aloe, Jute, and other Vegetable Fibres and their Manufactures.

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
1892	10,673,138	426,925
1893	7,605,524	304,220
1894	6,297,111	251,884

Class VI.—WOOLS, Bristles, Hair, and Manufactures thereof.

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
1892	10,530,979	421,239
1893	4,264,215	170,568
1894	9,403,543	376,141

Class VII.—SILK, and Manufactures thereof.

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
1892	5,065,251	202,610
1893	3,576,506	143,060
1894	5,492,426	219,697

In this class there is a general increase, more especially in tissues plain or twilled.

Class VIII.—Paper and its Appliances.

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
1892	2,578,003	103,120
1893	2,213,206	88,528
1894	2,549,697	101,987

Class IX.—Wood and other Vegetable Matters Employed in Manufactures, and Articles Manufactured therefrom.

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
1892	11,719,942	468,797
1893	9,282,647	371,305
1894	8,806,756	352,270

Class X.—Animals and Animal Products Employed in Industry.

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
1892	10,177,913	407,116
1893	9,212,062	368,482
1894	11,651,024	466,040

Class XI.—Instruments, Machinery, and Apparatus Employed in Agriculture, Machinery, and Locomotion.

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
1892	12,580,520	503,220
1893	10,317,416	412,696
1894	8,681,616	347,264

Class XII.—Alimentary Substances.

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
1892	35,459,539	1,418,381
1893	44,895,931	1,795,837
1894	46,874,469	1,874,978

Class XIII.—Miscellaneous.

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
1892	1,562,288	62,491
1893	1,062,553	42,502
1894	1,040,319	41,612

Special Imports, comprising Railway Materials, Materials for Agricultural Colonies, Tobacco, Gold, and Silver.

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
1892	27,603,410	1,104,136
1893	15,919,175	636,767
1894	15,364,751	614,590

Imports. From the summary contained in Annex 1 it will be seen that the total value of imports during the first 3 months of 1894 exceeded that during the corresponding year of 1893, although it did not attain the value of imports during 1892, which was a period of undue inflation in consequence of the anxiety of traders to replenish their stocks before the new tariff came into force. The classes in which increases occurred during the first 3 months of 1894 as compared with 1893 were :—

Class I.—Stones, minerals, glass, earthenware, &c.
Class II.—Metals and manufactures into which metal enters.
Class III.—Drugs, perfumery, and chemical products.
Class IV.—Cotton and cotton goods.
Class VI.—Wools, bristles, hair, &c.
Class VII.—Silk and manufactures therefrom.
Class VIII.—Paper and its appliances.

Class X.—Animals and animal produce employed in industry.
Class XII.—Alimentary substances.

Those showing a decrease being :—

Class V.—Hemp, flax, aloe, jute, &c., and their manufactures.
Class IX.—Wood and other vegetable matters employed in manufactures.
Class XI.—Instruments, machinery, &c.
Class XIII.—Miscellaneous and special imports.

Exports.

The returns for exports during the same 3 months, as will be seen by a reference to Table 2, show a progressive decrease from 206,737,708 pesetas (8,269,508*l.*) in the first 3 months of 1892 to 163,096,010 pesetas (6,523,833*l.*) in 1893, and 144,537,296 pesetas (5,781,486*l.*) in 1894.

The chapters of the tariff in which there have been increases are :—

Class VII.—Silk and manufactures thereof.
Class VIII.—Paper and its appliances.
Class IX.—Wood and vegetable materials used in manufactures.
Class X.—Animals and animal products employed in industry.
Class XI.—Instruments, machinery, &c.
Class XIII.—Miscellaneous.

General remarks.

The most striking decrease is in the class of alimentary substances, which includes the staple product of wine (Class XII.). As this is the only class in which the monthly returns give information respecting the countries of destination, the statistics contained in Table 3 may be of some interest as showing the continuous decrease in the exports of common wine to France, and a slight improvement in the sherry trade with England.

Annex 1.—TABLE of Imports during the First Three Months of 1892, 1893, and 1894.

Classifier.	Articles.	Sterling.			Currency.		
		1892.	1893.	1894.	1892.	1893.	1894.
		£	£	£	Pesetas.	Pesetas.	Pesetas.
1	Stones, minerals, glass, earthenware, and productions of pottery	880,449	774,778	806,048	22,011,245	19,369,467	20,151,221
2	Metals and manufactures into which metal enters	338,155	234,894	271,436	8,453,894	5,872,374	6,785,904
3	Substances employed in pharmacy, perfumery, and chemical industries	652,001	474,995	541,747	16,300,032	11,874,884	13,543,677
4	Cotton and its manufactures	1,206,114	1,140,354	1,387,156	30,152,851	28,508,872	34,678,920
5	Hemp, flax, aloe, jute, &c., and their manufactures	426,925	304,220	251,884	10,673,138	7,605,524	6,297,111
6	Wools, bristles, hair, and manufactures thereof	421,239	170,568	376,141	10,530,979	4,264,215	9,403,543
7	Silk and manufactures thereof	202,610	143,060	219,697	5,065,251	3,576,506	5,492,426
8	Paper and its applications	103,120	88,528	101,987	2,578,003	2,213,206	2,549,697
9	Wood and vegetable materials employed in manufactures	468,797	371,305	352,270	11,719,942	9,282,647	8,806,756
10	Animals and animal products employed in industry	407,116	368,482	466,040	10,177,913	9,212,062	11,651,024
11	Instruments, machinery, agricultural, industrial, &c.	503,220	412,696	347,264	12,580,520	10,317,416	8,681,616
12	Alimentary substances	1,418,381	1,795,837	1,874,978	35,459,539	44,895,931	46,874,469
13	Various	62,491	42,502	41,612	1,562,288	1,062,553	1,040,319
	Special imports	1,104,136	636,767	614,590	27,603,410	15,919,175	15,364,751
	Total	8,194,754	6,958,986	7,652,859	204,869,005	173,974,832	191,321,484

MADRID.

Annex 2.—Table of Exports during the First Three Months of 1892, 1893, and 1894.

Classifier.	Articles.	Sterling.			Currency.		
		1892.	1893.	1894.	1892.	1893.	1894.
		£	£	£	Pesetas.	Pesetas.	Pesetas.
1	Stones, minerals, glass, earthenware, and productions of pottery	835,775	802,236	782,522	20,894,394	20,055,922	19,563,057
2	Metals and manufactures into which metal enters	1,824,790	1,382,783	866,642	45,619,758	34,569,584	21,666,051
3	Substances employed in pharmacy, perfumery, and chemical industries	255,817	282,950	300,026	6,395,427	7,073,755	7,500,650
4	Cotton and its manufactures	289,230	350,483	348,727	7,230,980	8,762,098	8,718,183
5	Hemp, flax, jute, and their manufactures	49,638	56,900	48,388	1,240,956	1,422,513	1,209,720
6	Wool, bristles, hair, and manufactures therefrom	84,098	153,432	112,568	2,102,453	3,835,810	2,814,213
7	Silk and manufactures thereof	67,799	34,995	55,563	1,694,997	874,899	1,389,099
8	Paper and its applications	112,840	85,443	100,290	2,821,006	2,136,084	2,507,267
9	Wood and vegetable materials used in manufactures	327,093	316,002	345,432	8,177,342	7,900,069	8,635,821
10	Animals and animal products employed in industry	398,658	438,281	468,074	9,966,455	10,957,028	11,701,852
11	Instruments, machinery, agricultural, industrial, &c.	6,749	4,595	8,846	168,743	114,879	221,168
12	Alimentary substances	3,985,680	2,594,998	2,315,453	99,627,012	64,852,471	57,886,328
13	Various	31,927	21,635	28,955	798,185	540,898	723,887
	Total	8,269,503	6,523,833	5,781,486	206,737,708	163,096,010	144,537,296

Annex 3.—TABLE showing the Value of Wine Exported from Spain to the Countries named during the First Quarter of 1892, 1893, and 1894.

COMMON WINE EXPORTED.

Country.	Currency.			Sterling.		
	1892.	1893.	1894.	1892.	1893.	1894.
	Pesetas.	Pesetas.	Pesetas.	£	£	£
France	57,960,918	25,967,844	14,909,940	2,318,436	1,038,713	596,397
England	457,884	468,252	519,984	18,315	18,730	20,799
Rest of Europe and Africa	869,922	1,175,814	1,379,232	34,799	47,032	55,169
Cuba and Porto Rico	2,804,760	3,174,678	2,289,168	112,190	126,987	91,566
America	1,681,812	1,970,046	1,871,370	67,272	78,801	74,854
Asia and Oceania ...	303,282	120,834	122,238	12,131	4,833	4,889
Total	64,078,578	32,877,468	21,091,932	2,563,143	1,315,096	843,674

SHERRY AND SIMILAR WINES.

Country.	Currency.			Sterling.		
	1892.	1893.	1894.	1892.	1893.	1894.
	Pesetas.	Pesetas.	Pesetas.	£	£	£
France	6,029,280	749,280	1,151,040	241,171	29,971	46,041
England	2,455,920	2,035,200	2,552,160	98,236	81,408	102,086
Rest of Europe and Africa	400,200	436,440	392,880	16,008	17,457	15,715
Cuba and Porto Rico	128,040	11,280	28,920	5,121	451	1,156
America	567,840	741,120	436,200	22,713	29,644	17,448
Asia and Oceania ...	2,520	7,680	480	100	307	19
Total	9,583,800	3,981,000	4,561,680	383,349	159,238	182,465

SUPERIOR WINE ("GENEROSO").

Country.	Currency.			Sterling.		
	1892.	1893.	1894.	1892.	1893.	1894.
	Pesetas.	Pesetas.	Pesetas.	£	£	£
France	596,020	269,110	281,690	23,840	10,764	11,267
England	5,950	170	3,230	238	6	129
Rest of Europe and Africa	24,735	88,315	33,320	989	3,532	1,332
Cuba and Porto Rico	28,050	14,450	9,265	1,122	578	370
America	38,930	246,670	218,775	1,557	9,866	8,551
Asia and Oceania ...	1,360	3,060	2,380	54	122	95
Total	695,045	621,775	543,660	27,800	24,868	21,744

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REFERENCE TO PREVIOUS REPORT, Annual Series No. 800.

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Reference to previous Report, Annual Series No. 800.

SPAIN.

MALAGA.

Mr. Finn to the Earl of Kimberley.

My Lord, *Malaga, June* 15, 1894.

FOR my Agricultural Report this year I can do no better than forward two very interesting communications which I have received from Mr. Carl Luffmann, a well-known Australian agricultural expert who has been for some months studying Viticulture and Fruit Growing in this part of Spain.

I have, &c.

(Signed) ALEXANDER FINN.

Report on Agriculture for the Year 1893.

ABSTRACT of Contents.

	PAGE
I.—Agricultural report—	
Agriculturists wanted	2
Climate	2
In favour of Spain	2
Phylloxera	3
Quality of land	3
Iron foundry	3
Transport	3
A new industry	4
Olives	4
Sugar cane	4
Viticulture	5
Conclusion	5
II.—Notes on raising and drying muscatel grapes—	
Muscatel grapes	5
Malaga method of cultivation	6
Most favourable soil	6
Returns from cultivation	6
Local method of packing	7

A year's residence in Spain has so deeply impressed me with the value and importance of the country, that I think it a duty to say what I can to enlighten those in the old country who are looking for a safe outlet for their energies. Introductory.

I have no party purpose to serve, nothing more than a smal desire to see some of my fellow countrymen on the broad acres,

turning them to the best advantage, and so, making an independence for themselves, and increasing the well being of the world.

Each year makes speculation more problematic, energy is not of itself enough unless it is directed to the most secure and natural channels, and surely the most natural and safest of all is the land.

Having taken in a great deal of Spain, I cannot commit myself to the popular remark and say, "she is the most magnificent country in the world," but she has some magnificent parts, many of which are allowed to be idle and entirely unproductive.

As a colonial, I have had to deal with lands under the hardest natural condition so I may be excused for saying I am no idle speculator on what I consider the distant needs and opportunities which exist in Southern Spain. I have lately been investigating the most important fields in Europe, and I can think of no place which has impressed me as the province of Andalucia has done. It is, so far as I am aware, the only country which calls for a larger population. I consider Spain has but one real want, and that is, colonists. Her people of all grades are unable to compete with foreign trade; indifference to agricultural pursuits has caused many of the old landowners to neglect their estates, and the great phylloxera plague has so impoverished the small landowner and reduced the earnings of the common labourer to such an extent as to render a clear survival above ruin well nigh impossible. Such are the most direct causes of the distress in this part of Spain to-day.

No mere laws of man's making can enable the people of themselves to make her the land she should be, a people so underfed, with no future, must receive "a lift," it must be assisted before it can improve its surroundings. And the lift must be in a substantial form; nothing less than the introduction of new blood, energy, and capital can advance such a people, such a country, but these forces may be well spent as there need be no speculation so risky as to disturb the mind of the investor. With the importation of industrious men, capital, of modern appliances, there is every natural condition favourable to a speedy and profitable return.

Agriculturists wanted.

In choosing a position all things have to be considered, and to those who have any practical knowledge of agriculture I know of no country in Europe which presents advantages equal to those of Andalucia.

In England there is scarcely a young man who does not continually weigh and recount the prospects of home and foreign investment. To the majority the controlling instinct is desire for European life, and in this special particular Spain is very close to home, whilst the local attractions are of such an old world nature as to delight the most conservative.

Climate.

From a health point of view the climate is unrivalled, a circumstance which tells heavily in favour of happiness.

In favour of Spain.

I have no desire to idealise this land, but taking things as they are in England and Spain, given a certain kind of knowledge, of

a little capital, with a desire to invest it in such a way as to secure a living interest, coupled with a wholesome life, I say the balance is distinctly in favour of Spain.

Here there need be no drudgery, no hard competition, bad seasons, or dearth of sunshine, whilst the nearness of all Europe renders life more cosmopolitan and complete than it is to many who live within sight of the smoke of London.

Spain is not open to receive and benefit every class of emigrant, but it affords a good chance to young practical men who may have a knowledge of soils, the raising of field crops, garden produce, poultry, orchard fruits, forest trees, and various economic plants, to such the specialty appeals. The established industries of grape-growing and olive cultivation may be entered on with certainty, as the most ordinary workmen are expert in all branches of fruit cultivation, pressing and packing, so that new arrivals may, on paying for labour, be on an equal footing with the native grower.

There is one stumbling block to many who might otherwise be glad to settle here, and that is ignorance of the Spanish language, though there be many who knowing a little of Spanish would, once in the country, soon acquire sufficient proficiency to conduct their affairs with success.

Phylloxera. The phylloxera has done its worst, much of the country has been replanted with blight-proof vines which are giving a good return, and wherever new work is taken in hand there is the advantage of modern experience to guide one.

Quality of land. The land may not be called rich, but the best proof that it is not exhausted lies in the fact that wherever money is being expended and intelligent labour bestowed on land and crops, highly remunerative returns are coming in, and the prospect is even far better results.

The old fashioned customs in force here act very seriously against many present workers, but with sensible tools and implements the cost of labour might be considerably reduced, the lands improved, and profits made larger in proportion.

Iron foundry. There is a well established iron foundry in Malaga, owned by an English firm,* so that settlers would have no difficulty in obtaining such articles as their work might demand.

Transport. The facilities for marketing produce of a superior kind is very favourable. There is a regular steam service between Malaga, Barcelona, Marseilles, and other Mediterranean ports, and direct steam to England and the French Channel ports; also a through train service to Madrid and Paris, which latter can be reached in 70 hours, and where first quality early fruit and vegetables of all kinds, which can be produced here much earlier than in any other parts of Europe, are ever in demand.

To those not caring to enter into foreign trade there are reliable agents and merchants in Malaga who buy up every kind of produce.

Advantageous as this province undoubtedly is for the man with limited capital, I am of opinion that even grander results

* Mr. Rupert Heaton, Fabrica de la Esperanza, Malaga.

would accrue to any large agricultural company taking an interest in developing the wealth of the unoccupied Crown lands. These lands are for the most part areas which have been forfeited through the owners failing to pay the land tax, but owing to their present unused state and the cost of supervising, the Government has made specially favourable terms for purchasing or leasing the land, which is thus ridiculously low in price and free from taxation for a term of years.*

Some of these lands are really excellent, in many instances they have been resting for years, and the slight vegetation which has been accumulating and decomposing has strengthened and refreshed them considerably.

There are enormous tracts and excellent lands lying between Seville and Cordoba, Cordoba and Osuna, Osuna and Antequera, for the most part near to railways, good roads, and water, and I can safely say that for cereals (wheat and barley), for cork, oaks, olive and acacia growing, this country could not easily be surpassed. Almost anything could be grown to perfection, but I mention no more than I feel would be within thoroughly paying and practical limits.

These lands, worked under an efficient chief, or "cut up" into lots and sold to small settlers, thus forming an industrial colony, would be a purely philanthropic and at the same time paying concern.

There are houses and buildings in the most remote districts, so that in almost every case a start could be made without any great outlay.

Water is everywhere sufficient for domestic purposes, and generally there is enough to admit of irrigating a small plot of ground. Food and fuel are cheap, only meat may be said to be dear, about English prices.

A new industry.

A new and important industry might be opened up here by cultivating the acacia sylvestris for its bark, so valuable and much in request for tanning purposes. The tree grows quickly as under the best condition it is ready for stripping in its fourth to sixth year, and with yearly planting or by making provision for the seed to fall from a few trees, a continuous yearly supply may be secured after the trees are well established, the cost and cheapness with which it can be produced here, and the ever increasing demand and high prices obtained for bottle bark, force me to strongly recommend it to all who may take an interest in the lands of this province.

Olive.

The olive has suffered a serious decline owing to long cultivation without any cross-grafting or sound system of pruning, but with more modern varieties and better treatment there is still much to be done with the olive when associated with other crops. This province is most distinctly its natural European home, and the finest quality fruit and oil can be relied on where favourable cultivation is bestowed.

Sugar cane.

Sugar cane is now giving the highest return from the soil,

* See my Commercial Report for 1892 (No. 1282 of 1893), p. 9.

but as this cannot be grown apart from a plentiful supply of water and flat land the field must ever be limited.

Beyond question the most favourable industry for the small capitalist is the wine and rasin grape industry. For the purpose very small areas (mere gardens) furnish a very good return at the expense of a small outlay. Viticulture.

It is true that much of the really good land near Malaga is under cultivation, and present owners are not disposed to sell at low terms, but though prices are comparatively high the land is not really dear, as returns will prove.

Small vineyards favourably situated are valued as high as 200*l.* per fanega (practically a large acre*).

Say five (5) acres at 200*l.* equal 1,000*l.* The working of an acre, harvesting of fruit, drying, packing, &c., is about 15*l.* or 65*l.* for the year's work on 5 acres. The most ordinary crop ranges from 70 cases to 90 cases of raisins per acre; take the lowest of these boxes, of three classes, divided on the most regular basis, 25 boxes at 1*l.*, 25 boxes at 10*s.*, and 20 boxes at 7*s.* per box. This gives 44*l.* 10*s.* per acre, equal 222*l.* 10*s.* for 5 acres, which after deducting 65*l.* for labour, &c., leaves a clear margin of 157*l.* 10*s.*, and this, be it remembered, shows payment for everything, whereas a man working on his land would reduce the cost of production considerably, beside the main crop there is the opportunity to grow garden produce, fruits, fodder, and poultry, which can be marketed or used at home to keep down expenses.

But it is not only these favoured lands where high prices are asked that one might select to advantage. There are scores of little farms and vineyards on the slopes of hills round Malaga where the small capitalist with a knowledge of his work might labour with success.

One distinct want here is a land agency where intending vendors and purchasers might make the nature of their properties and needs known.

Taxation on comestibles of all kinds is comparatively light, but in placing the low cost of production and other material expenses against the returns, I do not see that the Spaniard labours under a burden equal to an English landowner and farmer.

I can only repeat my former remark, that this province is not suitable for every kind of Englishman, but for the man skilled in agricultural matters, who brings industry, insight, and a little capital to help him, Spain will, I believe, more than repay him for his labours. Conclusion.

II.—*Notes on Raising and Drying Muscatel Grapes.*

The muscatel grape requires a ferruginous soil to produce the most fleshy and sweet fruit with the flavour of muscatel well The muscatel grape.

* 1 fanega = 1·6374 acres.

marked. The vine also does well in slaty and stony ground, but grows most vigorously in deep alluvial soils, though in this last the fruit is deficient in flavour and bouquet, and is not well suited for drying purposes, as it is watery (lacking in gelatinous substance), but is excellent as a table grape, as it is luscious and very tender.

The Malagenan method of cultivation.

The Malagenan method of cultivation is in every way simple and ordinary. The only feature here which is not observed in other grape countries is that the "crowns" of the vine are kept very close to the ground. The object of this is to enable the surface growth to benefit from the close proximity to all moisture rising from or descending upon the soil, and to prevent exposure to strong and harmful winds. The present crops are being drawn entirely from the new hybrid varieties which are grafted on the American phylloxera-proof vine, "Riparia." Prunings of this vine are encouraged to root, and then grafted in a nursery bed, or planted out as cuttings, and the following year grafted as they stand in the vineyard. No special or particularly advantageous method of grafting is observed, and the system of pruning and labouring the soil is such as is well known and practised in Australia.

The Spaniards never encourage the growth of other crops between the vines, as the muscatel requiring good colour, flavour, and bouquet, it is absolutely necessary that the ground be given up to it. Where strong winds are frequent, an occasional row, or "belt," of olive or similar evergreen trees may be used to advantage.

Most favourable soil.

Long experience has proved that land lying at a slope of from 30 to 45 degrees is the most favourable for the growth of raisin and wine-producing grapes. In Spain a south-east, and in Australia a north-east aspect is best suited to the muscatel, as it demands the heat rays of the late autumn sun.

Returns from cultivation.

The vines give a return in the second and third years, but are not expected to yield a paying crop until the fourth year.

"Green" pruning is infrequent, as the fruit requires protection against the hot sun and air in rapid motion. Muscatel grapes are never cut from the vine till the growth has practically ceased, for should grapes be cut whilst the sap is rising they will be insufficiently "primed," fermentation take place, and the fruit rendered useless.

The grower must observe that the main stem of each bunch is brown and shrunk, and that the grapes on being pricked give off no free juice. The juice should be fairly "set" ere the grape is detached from the vine. The "bloom" of the grape is a most important item, and especial care is always necessary to develop and preserve it. Grapes far above the ground and exposed to air in motion cannot get that perfection of colour which those possess when well sheltered and near the ground. Before the juice is set in the grape the bloom is very free, but the juice congealed, the bloom becomes firmer and will bear careful handling, though the muscatel should never be handled except by the stems, and always by naturally dry, cool hands.

The local method of drying and packing is as follows :— Local method of packing.

The fruit is cut and brought in baskets to the "drying slope," a pyramid-shaped mound of earth held in position by brick or stone work. The surface of this mound (which may have two or more sides) is usually at an angular slope of 45 degrees, and is covered with loose clean gravel. The fruit is placed over the surface of the slopes, and usually receives a turning every other day for eight days, which is the usual time for drying, but exceptional heat or damp weather may reduce or advance this period considerably. A canvas awning is spread over the fruit during the night-time and also in the middle of very hot days. Uniformity of the day temperature must be aimed at, and regular care in the handling and turning of the grapes. When the fruit is sufficiently dry it will be shown by the fruit being "passive"—it can be pressed into any shape and does not reform itself. The seeds are also independent of the flesh, and should be an even coffee-brown colour, showing no trace of green at the small end. The fruit ready for boxing, each bunch is examined, and with the aid of a pair of scissors all faulty and inferior grapes are nipped from the bunch. They are then laid aside to form classes from 1 to 6, great care and equality of sample being observed in all samples.

Without further treatment of any kind the fruit is placed in well dried boxes, the best fruits in thin layers between good white paper, and each layer is set off by a covering of single raisins of the best shape and appearance. Classes 3 to 6 are packed in a body, but with equally good attention to boxes and paper lining.

Fruit so prepared is exported to all parts of the world, and is considered able to retain its prime quality for three years in almost any climate.

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SPAIN.

REPORT ON THE

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REFERENCE TO PREVIOUS REPORT, Annual Series No. 1246.

Presented to both Houses of Parliament by Command of Her Majesty,
AUGUST, 1894.

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Reference to previous Report, Annual Series No. 1246.

SPAIN.

MADRID.

Sir H. D. Wolff to the Earl of Kimberley.

My Lord, *Madrid, June* 23, 1894.

I HAVE the honour to transmit herewith a Report on the Spanish Estimates for 1894–95 drawn up by Sir George Bonham.

The Report also contains information relating to Spanish Finance of previous years.

I have, &c.

(Signed) H. DRUMMOND WOLFF.

Report on the Spanish Estimates for the Year 1894–95.

ABSTRACT of Contents.

	PAGE
Introductory remarks	2
Finance Minister's introductory statement	2–4
Accounts for 1892–93	4
„ 1893–94, calculated on two systems	5
Negotiations with Basque Provinces and Navarre for increased contribution	6
Extraordinary budget explained	7
Budget for 1894–95 calculated on automatic system	8
Decreases and increases of revenue and expenditure	8
Table showing estimates—remarks on	9–11
Table of public debt	12–13
Unimportant changes contemplated	13–14
Proposed loan	14
Budgets from 1850 to 1890	14–15
Principal characteristics	15–22
Origin and growth of—	
Tax on real property, agriculture, and cattle breeding	22–23
„ industry and commerce	23–25
„ legacies and transfer of property	26–27
„ personal certificates	27
„ salaries	28
„ articles of consumption	29
„ tobacco	30
State lotteries	32

Introductory remarks.

The following summary of the Finance Minister's statement, presented to the Cortes on June 7, will suffice to show the financial state of the kingdom at the present time.

Having only recently assumed office, Señor Amos Salvador has had the advantage of succeeding Señor Gamazo, a Finance Minister of singular ability, whose energy in making the most of existing taxation has raised the revenue to a figure which renders Señor Amos Salvador's task a comparatively easy one, by enabling him to dispense for the present with additional taxation.

Señor Salvador's proposal to consolidate the floating debt by means of a loan guaranteed by the revenue derived from the tobacco monopoly may not be accepted, but as arrangements have been made with the Bank of Spain for renewing the Treasury Bills which fall due at the end of June, amounting to 331,000,000 pesetas (13,240,000*l.*), no immediate pressure will be felt.

What may be called the retrospective part of the report gives an account of Spanish finance since 1850. It is taken from a work published by the Ministry of Finance, and is of more than historical interest as showing that the development in the resources of Spain during that period has been greater than is generally supposed.

The report closes with an account, taken from the same source, of the origin of the more important taxes and of the modifications to which they have been subjected, throwing light on much that is obscure in the fiscal system of the country. It is to be regretted that the abundance of material relating to the subject has made it difficult to compress the results of this investigation within more moderate limits.

In introducing the estimates for 1894–95 the Minister of Finance lays stress on the extreme interest attaching to questions affecting the Exchequer, not only as regards the financial condition of the country, but also with reference to the influence exercised on the public welfare by the reforms introduced, and the manner in which they are carried out.

Deficits since 1889-90.

In order to demonstrate the improvement which has taken place in the financial state of the kingdom, the results of the last five years are given, in which the following deficits occurred:—

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
1889-90	61,246,278	2,449,731
1890-91	75,689,681	3,027,587
1891-92	92,775,108	3,711,004
1892-93	74,732,685	2,989,307
1893-94	46,977,122	1,879,084

Including the liabilities charged in the extraordinary budget, which amounted to—

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
In 1891–92	16,983,733	679,349
1892–93	27,686,257	1,107,450
1893–94	19,321,776	772,871

The sums in the foregoing table are calculated according to the system of 18 months to the financial year, and although the new system is now in force the estimates for 1893–94 are, for the purpose of comparison with previous years, calculated on both systems.

Defence of Spanish finance.

From this statement the conclusion is drawn that the pessimist views prevailing with regard to Spanish finance are unfounded, and that when the expenditure is confined within strict limits, the natural elasticity of the revenue under an active and persevering administration will suffice to produce a permanent and normal adjustment of revenue and expenditure. An increase in the revenue may, moreover, be looked for from a system of administration under which there is less necessity for official intervention.

Outline of budget.

The taxes with regard to which the necessity for readjustment is stated to be most urgent are the territorial tax, the tax on industry and commerce, on articles of consumption, tobacco (which is stated to be susceptible of great development), stamps, and transfer dues, the farming-out of which has been attempted, but without success.

A warm tribute is paid to the energy and financial ability of preceding Finance Ministers of both political parties, but more especially to that of Señor Gamazo, to whose efforts the surplus of 41,866,837 pesetas (1,674,673*l.*), to which, according to the new system of financial administration, Señor Amos Salvador looks forward at the end of the financial year, is mainly to be attributed.

Having regard, however, to the shortness of the time at his disposal, the Minister proposes to confine himself for the present to a few of the more urgent alterations required by public opinion, although he hopes later to undertake more important changes, especially one relating to the tax on sugar.

With regard to expenditure there is to be no increase that can be avoided, but as there is no longer any extraordinary budget it has become necessary to include in the ordinary budget sums hitherto included in the former, such as the cost of remitting abroad the sums for payment of the coupon of the exterior debt, an annual loss from the exchange which is estimated at 19,000,000 pesetas (760,000*l.*). The Minister, however, believes (although he does not state the grounds for his belief) that this is only temporary, and that a decrease will take place in the relative value of foreign money if, as is probable, a part of the projected loan should be raised abroad, in which case this loss would not have to

be considered. The other sums henceforward to be included in the ordinary budget are the war material for artillery and engineers, and also a subvention to the railway companies, amounting respectively to 2,800,000 pesetas (112,000*l.*) and 5,550,000 pesetas (222,000*l.*).

As regards revenue the Minister declares himself to be averse to any essential alterations of the estimates, as an increase should be sought for rather in administrative reforms. Although he does not forego the idea of introducing them later, he is at present unable, from want of time, to do more than carry on the work of his predecessors.

Señor Amos Salvador is thus enabled to present estimates which do not require any extraordinary measures for their liquidation, as there is a larger sum available for the purpose than is necessary. The revenue is furthermore being strengthened, as it can count with confidence on fresh resources.

The advantages of the new budget are stated to be the suppression of the extraordinary budget, the strict care with which the expenditure has been calculated, and the fact that the revenue is estimated on the automatic system instead of on that of valuations, which, as will be shown later on in this report, has been made a main point of attack in the Spanish financial system. Whenever the automatic system is departed from the Minister states it has only been with the object of fixing a lower estimate, as in the case of the customs, from which 18,000,000 pesetas (720,000*l.*) have been struck off on account of the anticipated falling-off in the grain imports this year in consequence of a good harvest.

Señor Amos Salvador concludes this part of his financial statement with the announcement that, owing to the desirability of putting an end to the connection between the Bank of Spain and the Treasury, it becomes necessary for the Government to carry out a credit operation in the form of a loan, for which a Bill is introduced under the guarantee of the revenue from tobacco.

Accounts for 1892-93.

Before giving the estimates for 1894–95 the Minister of Finance shows the results of the financial year 1892–93, now finally closed, and also those for the current year ending June 30 as far as they can be ascertained.

	Amount.	
	Currency.	Sterling.
	Pesetas.	£
The estimates for 1892-93 fixed the probable revenue at	747,960,550	29,918,422
Probable expenditure	742,212,811	29,688,512
Estimated surplus	5,747,739	229,910

The actual result will be—

	Amount.	
	Currency.	Sterling.
	Pesetas.	£
Revenue	707,398,172	28,295,926
Expenditure	754,444,600	30,177,784
Actual deficit	47,046,428	1,881,858

Accounts for 1893–94, calculated according to the new system.

The financial accounts for 1893–94 are in the first place submitted to a different treatment from those of 1892–93, according to the new system introduced by Article 20 of the law for regulating the public finances which has since come into operation. By this new system accounts must be settled within the financial year ending June 30, and the extra period of 6 months for winding up accounts will no longer be allowed, so that the financial year, or "exercicio," will in future consist of 12 months instead of 18 months, the result being that payments not effected within the prescribed term will be carried on to the estimates of the following year. According to the statement drawn up on this system from the actual receipts until the end of April, with a moderate estimate for those of May and June, there is a residue over from the financial accounts of 1893–94 of 41,866,837 pesetas (1,674,673*l.*), including the extraordinary war expenditure occasioned by the incident at Melilla, which amounted to 28,237,831 pesetas (1,129,513*l.*), without which the residue would have amounted to 70,104,670 pesetas (2,804,186*l.*), a sum larger by 2,000,000 than that required for the interest and sinking fund of the public debt for the last quarter of the financial year 1893–94, which, according to the new arrangement, will become the first quarter of the financial year 1894–95.

According to the old system.

The Government, in order to dispel all doubts as to the absolute adjustment of the budget, has prepared a second statement calculated on the supposition of the financial year continuing for an additional period of 6 months, according to which the probable receipts during 18 months would amount to 734,111,587 pesetas (29,364,463*l.*), and the probable expenditure to 761,766,932 pesetas (30,470,677*l.*), leaving a deficit of 27,655,345 pesetas (1,106,214*l.*). Deducting from the receipts the voluntary subscriptions for the war in Melilla amounting to 1,044,464 pesetas (41,778*l.*), and from the expenditure the probable outlay under that heading amounting to 29,282,295 pesetas (1,171,291*l.*), there would remain a small surplus of 582,487 pesetas (23,299*l.*).

Negotiations with Basque provinces for increased contribution.

The arrangements by which a larger contribution will in future be received from the Basque provinces, and the unsuccessful negotiations with Navarre, are next described.

By virtue of the authority granted to the Government by the last budget law for revising their financial arrangements, dele-

gates from the Basque provinces attended a congress held in Madrid, and after lengthened discussions with the authorities of the Exchequer, an arrangement was concluded by which these provinces agreed to increase their annual contribution to the Central Government by 1,000,000 pesetas (40,000*l.*), care being at the same time taken to reassert the economic and administrative independence of the provinces which the Government has never had any intention of infringing. The increased sum has been divided between the provinces of Biscay and Guipuzcoa, as the resources of Alava do not at present admit of an increase. The term fixed for the duration of this increase is 12 years, it being expressly stated in the Royal Decree fixing the amount payable that in the province of Biscay, which is greatly influenced by its traditions, there is especial necessity for an interval of time to accustom the inhabitants to increased taxation.

Negotiations with Navarre.

The province of Navarre proved less tractable. The provincial deputation sent to Madrid declared its inability to entertain the proposal made by the Government on the ground that it was contrary to the provisions of the law of 1841, from which they derived their legal independence, adding that the unanimous feeling of the country was against it, that although they were willing to make great sacrifices they were resolved not to abandon their just rights.

The Government contended, but without effect, that the province of Navarre was mistaken in supposing that the law of 1841 was unalterable, as, in fact, alterations had been made in it by the Royal Decree of 1877, and that there was no intention of depriving the province of its just rights any more than there had been any of depriving the Biscay provinces of theirs.

As Navarre has remained firm in its resistance the Government have laid before the Cortes a proposal that a period of 4 months should be allowed it to reconsider its decision.

Extraordinary budget explained.

The extraordinary budget consisted of the sum of 234,000,000 pesetas (9,360,000*l.*) authorised by the law of July 7, 1888, for the construction of new ships, the development of dockyards and submarine defensive works. It was not, however, confined to these objects, as in 1891 sums from it were devoted to armaments and public works, and in 1892 expenditure in excess of 6,000,000 pesetas (240,000*l.*) on account of loss from the exchange in the payment of the external debt was charged to the extraordinary budget, an equivalent being deducted from sums granted for War, Marine, and Public Works.

Of the total amount of 234,000,000 pesetas (9,360,000*l.*), 193,637,688 pesetas (7,745,506*l.*) has been expended as follows :—

Description.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
Public debt on account of loss from exchange ..	14,162,968	566,518
War	9,298,053	371,922
Marine	136,428,437	5,457,137
Public works	33,748,229	1,349,929
Total	193,637,688	7,745,506

thus leaving a residue of 40,362,311 pesetas (1,614,494*l.*) available April 1, which it is proposed to apply as follows:—

Description.	Amount.		
	Currency.	Sterling.	
	Pesetas.	£	
Debt (public debt, *i.e.*, expense of remitting funds for payment of coupon of exterior)	6,021,790	240,872	Proposed disposal of residue left.
War	684,528	27,382	
Marine	33,579,795	1,343,193	
Public works	76,198	3,047	
Total	40,362,311	1,614,494	

The extraordinary budget being exhausted need not further be taken into account. The results of the financial year 1893–94, as far as can be judged from the results of the first 10 months, are considered so satisfactory that the Minister takes a hopeful view with regard to the future. He does not, however, consider the present an opportune moment for embarking on any fresh expenditure. The improved system of collecting revenue, commenced some years ago, made considerable progress in 1892–93, resulting in an increase of receipts of 27,000,000 pesetas (1,080,000*l.*), and in the first 10 months of the present financial year there has been an increase of 31,000,000 pesetas over the corresponding period in the preceding year, so that in less than 2 years there has been an increase of 58,000,000 pesetas (2,320,000*l.*) in the ordinary revenue. Increased revenue from existing taxes.

On the question of calculating the revenue, the Minister remarks that if it had been considered necessary to obtain an apparent but illusory balance, it would only be necessary to take as a basis the actual receipts during the current year, making such alterations as their increase or decrease would seem to justify, and a table is given to corroborate this assertion; but, he adds, a surplus thus obtained would have again changed into a deficit as has constantly happened before. He accordingly takes Revenue calculated on the automatic system.

credit for having adopted a more strictly automatic system, which moreover has become the only one practicable since the suppression of the six months hitherto allowed for the liquidation of accounts.

The accidental causes by which receipts may be affected have also been taken into account, especially as has been already mentioned in the case of the customs, which were abnormally increased last year by the imports of cereals resulting from a deficient harvest.

Decreases of revenue.

The decrease in revenue from various sources amounts to 27,294,301 pesetas (1,091,772*l.*), the more important, i.e., those amounting to more than 1,000,000 pesetas (40,000*l.*), being the tax on real property, agriculture, and cattle breeding; the tax on legacies and on transfer of property; on personal certificates; consular dues; the special tax on alcoholic beverages; the tax on sugar; posts and telegraphs; lotteries; the quicksilver mines of Almaden; and redemption from military service.

Increases of revenue.

The increases, on the other hand, amount to 34,161,171 pesetas (1,366,446*l.*), of which 10,661,171 pesetas (426,446*l.*) were from miscellaneous sources, the most important being, articles of consumption, stamps, and the mint; 16,500 pesetas (660*l.*) from the custom-house (notwithstanding the estimated decrease from cereals), and 7,000,000 pesetas (280,000*l.*) from two instalments of the war indemnity from Morocco. The net increase is therefore estimated at 6,866,870 pesetas (274,674*l.*).

Expenditure.

It is pointed out that whereas expenditure on account of the public debt has increased since 1883–84 by the sum of 55,000,000 pesetas (2,200,000*l.*) and on pensions by 7,000,000 pesetas (280,000*l.*), the expenditure on the various departments of State has been reduced by 32,000,000 pesetas (1,280,000*l.*). The deficits have been provided for by:—1. Departmental economies, with regard to which considerable reductions have been made. 2. Issues of floating debt. 3. Issues of redeemable bonds. The growth of expenditure renders more apparent the necessity for a reduction of the general liabilities of the State, more especially the sum of 19,180,000 pesetas (760,000*l.*), now caused by the loss from the exchange in payment of the exterior debt, a loss calculated at 22 per cent. on a capital of 87,180,000 pesetas (3,487,200*l.*).

Result of extinction of extraordinary budget.

In consequence of the extinction of the extraordinary budget, payments hitherto included in it are now charged in the ordinary estimates, such as the abovementioned payment of 19,180,000 pesetas, the expenditure on war material, and subventions to railway companies.

Increase in credits asked for.

Comparing the credits now asked for with those granted last year the total increase amounts to 31,447,659 pesetas (1,257,906*l.*), including the payments hitherto comprised in the extraordinary budget amounting in the aggregate to 27,350,000 pesetas (1,094,000*l.*). If these are deducted the net increase on account of supply is shown to be 4,097,659 pesetas (163,906*l.*). Of this increase the larger half, consisting of sums of 2,699,843 pesetas

and 999,506 pesetas respectively due to the Departments of War and Marine, is directly attributable to the military operations at Melilla. The former sum being for the maintenance on active service of six regiments, and for increasing the army contingent and the garrisons in Africa; the latter sum including the expenditure on Maüser rifles. Result of campaign at Melilla.

The conclusions drawn by the Finance Minister from these estimates are encouraging, taking into account the elasticity shown by the revenue and the fact that the floating debt and the loss from exchange might be extinguished by a loan for which however there is no immediate necessity, as the sum which it is expected will remain over from the year 1893–94, amounting as has been shown to 41,866,837 pesetas, is more than sufficient to extinguish an estimated deficit of 24,533,497 pesetas (981,339*l.*). Conclusions drawn.

A further reason why there is not any immediate necessity for a loan is that, as the result of negotiations with the Bank of Spain which have taken place, the basis of an agreement has been made deferring for a year the payment of the sums which fall due on June 30, a period of delay which may, if thought necessary, be extended to 5 years, or which can be reduced by either party to the arrangement on giving 6 months' notice Arrangement with the Bank of Spain.

Estimates for 1894–95.*

Revenue.

Description.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
Direct taxes	286,744,973	11,469,798
Indirect taxes..	287,357,000	11,494,280
Monopolies, &c., administered by the State	129,979,000	5,199,160
State property and dues—		
Rents	18,630,250	745,210
Sales	2,147,000	85,880
Ordinary	12,735,000	509,400
Extraordinary	7,000,000	280,000
	744,593,223	29,783,728
Deficit	24,533,497 ·60	981,346
Total	769,126,720 ·60	30,765,074

* The Cortes having adjourned for the recess without the budget having been voted, the budget for 1893–94 will continue in force until the new estimates are voted, which will probably be when the Chambers meet in October or November, unless a change of Government should occur. Meanwhile it is stated a Royal

EXPENDITURE.

Description.	Amount. Currency.	Sterling.
	Pesetas.	£
Civil List	9,500,000	380,000
Legislative Bodies	1,526,585	61,063
National Debt	327,250,604·57	13,090,024
Recognised debts due to the State	1,678,172·85	67,126
Pensions, &c.	55,067,477	2,202,699
Presidency of the Council of Ministers	883,050	35,322
Minister of State, Foreign Department	4,758,542·24	190,341
Minister of Grace and Justice, Civil Expenditure	12,393,758·68	495,750
Minister of Grace and Justice, Ecclesiastical Expenditure	40,081,560·30	1,603,262
Minister of War	139,372,058·95	5,574,882
„ Marine	23,502,457·86	940,098
„ Home Department	26,557,100·22	1,062,284
„ Public Works	82,174,889·10	3,286,995
„ Finance	16,349,701·70	653,998
Expenditure on collection of revenue	27,330,762·13	1,093,230
Colony of Fernando Po	700,000	28,000
Total	769,126,720·60	30,765,074

Revenue.

It will be unnecessary to give a detailed analysis of each chapter of revenue and expenditure, but with regard to the former it may be noted that the Queen Regent has for a second time given a donation of 1,000,000 pesetas (40,000*l.*) in her son's name from the Civil List.

Donation of Queen Regent.

Direct taxation.

The revenue from direct taxation is estimated at 286,744,973 pesetas (11,469,798*l.*). The tax on real property, agriculture, and cattle-breeding is calculated to bring in 154,000,000 pesetas

Decree will be issued authorising the expenditure of 30,978,837 pesetas for immediate requirements.

This sum is apportioned as follows :—

Description.	Amount. Currency.	Sterling
	Pesetas.	£
For paying the loss on the external debt caused by the exchange	17,300,000	692,000
For the Ministry of Finance	1,550,000	62,000
Ministry of War	5,550,855	221,842
Ministry of Marine	330,506	13,220
Ministry of Interior	119,275	4,771
Ministry of Public Works for subventions to railways	5,550,000	222,000

The whole amount, 30,978,836 pesetas, will, it is stated, be provided for by the surplus in hand at the end of June.

(6,160,000*l.*). The tax on industry and commerce, 44,000,000 pesetas (1,760,000*l.*). The tax on legacies and transfer of property, 32,000,000 pesetas (1,280,000*l.*). The tax on salaries, 22,700,000 pesetas (908,000*l.*). The contribution from the Basque Provinces and Navarre, 9,190,644 pesetas (367,625*l.*).

Indirect taxation.

The total receipts from indirect taxation amount to 287,357,000 pesetas (11,494,280*l.*), comprising 122,807,000 pesetas (4,912,280*l.*) from customs, of which 112,000,000 pesetas (4,480,000*l.*) are from import duties, and 76,200,000 pesetas (3,048,000*l.*) from the tax on articles of consumption.

State monopolies.

State monopolies produce 129,979,000 pesetas (5,199,160*l.*), of which the most important, tobacco, yielding 96,000,000 pesetas (3,840,000*l.*), and State lotteries which yield 25,000,000 pesetas (1,000,000*l.*).

Miscellaneous.

Of miscellaneous Treasury receipts, "recursos del Tesoro," the most important are the sums received from redemption of military service, 8,000,000 pesetas (320,000*l.*), and the Morocco war indemnity, 7,000,000 pesetas (280,000*l.*).

Expenditure.

With regard to expenditure that on the national debt is of sufficient interest to justify full details, a translation of the chapter dealing with it is therefore annexed, from which it will be seen that it is divided into two parts, the debt of the State and the debt of the Treasury, and also that several headings of debt are indicated to which no sums are attached.

PUBLIC Debt.

Item.	Description.	Amount.	
		£	£
	PART I.—STATE DEBT.		
	Consolidated Debt.		
1	Interest on the Consolidated Debt of 5 per cent. due to the United States	..	
2	(1) Interest on perpetual External Debt at 4 per cent.	3,153,841	
	(2) Ditto on Interior Debt and intransferable Stock of Civil Corporations	3,632,551	
	(3) Ditto on sums raised by the sale of alienated property	..	
	(4) Ditto on inscribed stock, granted to the clergy on commutation of their property	..	
			6,786,392
3	Redemption of residues of Consolidated Debt	..	400
	Redeemable Debt.		
4	(1) Interest and redemption of Redeemable Debt at 4 per cent.	4,059,274	
	(2) Commission of 1¼ per cent., payable to the Bank of Spain for the quarterly payment of interest and Sinking Fund on certain classes of securities	50,740	
			4,110,014
5	(1) Interest on shares for public works ..	386	
	(2) Redemption of ditto	3,765	
			4,151
6	(1) Interest on shares for road-making ..	218	
	(2) Redemption of ditto	2,226	
			2,444
7	Annuities for redemption of arrears due to State officials	..	2,000
8	Redemption of claims pending for payment of 4 per cent. Redeemable Stock	..	..
9	Ditto on former loan	..	..
10	Loss from exchange; sums provided for meeting the loss incurred by sending abroad money for payment of the National Debt ..	..	692,000
			11,597,401
	PART II.—TREASURY DEBT.		
11	Annual payment for interest and redemption of a loan advanced by Messrs. Rothschild on the security of the sale of quicksilver ..	..	150,000
12	Interest and redemption of the loan advanced by the tobacco company for naval construction	..	486,984

PUBLIC Debt—continued.

Item.	Description.	Amount.	
		£	£
	PART II.—TREASURY DEBT—continued.		
13	Sums for paying interest on the Floating Debt of the Treasury	..	707,200
14	Interest on deposits lodged as guarantees for public works, contracts, and for the third part of 80 per cent. on communal property, "Propios"	..	140,000
			1,484,180
	OUTSTANDING LIABILITIES.		
15	Liabilities for which there is no supply granted by the Legislature	..	8,435

SUMMARY.

Description.	Amount.
	£
Part I.—State Debt	11,597,401
„ II.—Treasury Debt	1,484,180
Outstanding liabilities from former budgets	8,435
Total	13,090,016

The changes contemplated in the new budget with regard to revenue are few and unimportant. Insurance companies will in future be liable to the industrial tax, 3 per cent. being charged on policies effected in Spain. Life insurance companies as well as those against accidents, and also co-operative insurance companies will pay ½ per cent. on insurances already made or about to be made in Spain. Agents of life insurance companies will pay a tax of 2 per cent. on their commissions. Changes contemplated.

The tax on legacies and on transfer of property is to be farmed out; offers to be based on the amount of net revenue yielded in any of the last 5 years, the State claiming a proportional share in any increased receipts. Tax on legacy and transfer duty.

In substitution for spirit licenses a surcharge will be exacted from all tradesmen equivalent to that already fixed by Royal Decree of February 8, 1894, according to his trade and the population of his place of business in addition to his assessment to the industrial tax. Abolition of spirit licenses.

The tax on carriages will be paid on the number of horses intended to draw them according to an assessment made for each Tax on carriages.

horse or team of horses, in addition to which 50 pesetas (2*l.*) will be paid for each carriage in excess of those for which horses have been assigned as a basis of assessment.

Playing cards. The duty on playing cards will be reduced to 15 c. on each pack.

Province of Navarre. A period of 4 months is granted to the province of Navarre for making arrangements with the Government respecting the share which it should contribute to the public revenue.

The Minister's statement closes with a Bill authorising the Government to contract a loan for the purpose of consolidating the floating debt. This they are authorised to do by the last budget law, but it is thought advisable to ask for a fresh authority, offering as security the revenue derived from the tobacco monopoly.

The amount of Treasury bills falling due on June 30 is 333,112,000 pesetas (13,324,480*l.*), and the amount of the loan which it is proposed to raise is 500,000,000 pesetas (20,000,000*l.*).

It is not, however, considered probable that this proposal will be adopted as there appears to be an aversion to granting the security of the tobacco monopoly if a loan can be raised without it, and also because in view of the arrangement with the Bank of Spain, which has been referred to, there is no immediate necessity for raising a loan.

It need hardly be pointed out that this arrangement will lead to the increase of the floating debt, and that the necessity for a loan is only deferred.

Full statistical information relating to the budgets of 40 years, between 1850 and 1890, and the results shown by their liquidation, have been published in an official form. In endeavouring to summarise this information, which is of interest in showing the progress which has been made during that period, some observations of the author have also been given as showing the disadvantage under which Spanish finance has laboured in the past and the remedies which in his opinion should be applied.

According to these tables the estimated revenue amounted :—

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
In 1850	324,568,706	12,922,748
1891	840,551,387	33,022,052
Difference	515,982,591	20,629,304

an increase of 158 per cent.

The details of the increase are given in the following table which also gives the increase per cent. :—

Description.	Amount.		Per Cent.
	Currency.	Sterling.	
	Pesetas.	£	
Tax on real property	91,757,000	3,670,280	17·78
Customs	85,920,000	3,436,800	16·65
Lotteries	57,890,000	2,315,600	11·21
Tobacco	48,500,000	1,940,000	9·39
Articles of consumption	48,000,000	1,920,000	9·30
Tax on industry and commerce ..	33,875,000	1,355,000	6·56
Stamps	33,280,750	1,331,238	6·45
Royalties	24,250,000	970,000	4·69
Salaries and dotations	21,142,110	845,684	4·09
Alcohol	18,000,000	720,000	3·49
Sales subsequent to May 1, 1855 ..	14,410,000	576,400	2·79
Tax on railway rates, passengers, and merchandise	13,600,000	544,000	2·63
Substitutes for military service ..	9,300,000	372,000	1·80
Certificates of identity	6,692,500	267,700	1·29
Miscellaneous receipts	5,529,276	221,168	1·07
Receipts from closed financial years	4,800,000	192,000	0·93
Consular fees..	1,550,000	62,000	0·30
Mint	1,411,120	56,444	0·27
Tax on mines..	1,360,000	54,400	0·26
Miscellaneous items..	4,021,984	160,876	0·78
Extraordinary receipts	45,543,621	1,821,744	8·02
Total	570,833,362	22,833,334	..

To be deducted on account of diminutions :—

Description.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
Salt	25,250,000	1,010,000
Surplus from Colonial budgets	17,875,000	715,000
Tolls and ferries	3,129,000	125,160
Receipts from State property	2,957,881	118,312
Gunpowder	1,750,000	70,000
Various items showing diminution	3,888,891	155,552
Total	54,850,772	2,194,024

Showing a net increase of 515,982,591 pesetas (20,629,304*l.*).

The credits granted for carrying on the Government amounted to—

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
In 1850	324,560,905	12,982,436
1890–91	834,193,768	33,367,748
Increase	509,632,863	20,385,312

being 157 per cent.

The increases are shown in the following table:—

Description.	Amount.		Per Cent.
	Currency.	Sterling.	
	Pesetas.	£	
Public Debt	251,144,729	10,045,789	49·28
Ministry of Public Works	72,982,392	2,919,295	14·32
Ministry of War	68,668,407	2,746,736	13·48
Treasury and collection of taxes ..	40,463,081	1,602,523	7·86
Ministry of Marine	30,615,021	1,224,600	6·01
State pensions	17,547,359	701,894	3·44
Ministry of Interior	17,212,950	688,518	3·38
,, Grace and Justice ..	10,626,330	425,053	2·08
,, Foreign Affairs	2,462,921	98,516	0·48
Legislative bodies	1,021,339	40,853	0·20
Presidency of Council of Ministers	840,467	33,618	0·17
Colony of Fernando Po	735,476	29,419	0·14
	513,925,476	20,557,014	100·84
Decrease	4,292,613	171,702	0·84
Total	509,632,863	20,385,312	100

The result shown on this survey is that 52 per cent. of the increase is absorbed by the public debt and the so-called "clases pasivas," including pensions, indemnities to ecclesiastics on the suppression of religious houses, subsidies to the Mont de Piété, &c.; 26 per cent. by the military and naval forces, leaving 21 per cent. for the other Government departments. This explains the difficulty experienced by all Spanish Administrations in reducing the public expenditure, as deducting the large sums absorbed by the public debt and by the army and navy, the increase of expenditure has been moderate if compared with the development of agriculture, the construction of railways, roads, harbours, lighthouses, canals, and other works of public importance such as the development of telegraphs and the telephone system, the postal service, and the reorganisation of the tribunals.

With regard to the liquidation of the annual budgets it is shown that, even when the revenue fully realises the expectations

put forward in the budget, it is found necessary to make provision for a further sum of 50,000,000 pesetas (2,000,000*l.*) as representing unforeseen and extraordinary expenditure.

If the budgets for the last 40 years are taken the average initial deficit at the commencement of each financial year is found to be 17,570,088 pesetas (702,801*l.*), as shown by the following table:—

Description.	Amount.	
	Currency.	Sterling.
	Pesetas c.	£
Revenue during 40 years	26,520,065,485 75	1,060,802,616
Expenditure	27,222,867,015 42	1,088,914,680
Deficit for entire period	702,801,529 67	28,112,064
„ 1 year	17,570,088 24	702,801

This sum does not include extraordinary expenditure.

It appears that besides miscalculations in estimating the revenue, expenditure was habitually authorised far beyond the sums inserted in the estimates. Sometimes under the word "memoria," which implies an almost unlimited credit, sometimes by extraordinary grants to be covered by the floating debt when, as is always the case, the expenditure exceeds the revenue, and sometimes by the practice of transferring to succeeding financial years in a permanent form the residue of credits granted in previous years, without providing at the same time corresponding resources to meet them. To remedy this the law of June 29, 1890, was passed, prohibiting the granting of credits of a permanent nature.

The system of supplementary credits is, however, defended on the ground that they are inevitable as the legislature is not sitting permanently, and unforeseen events necessitating corresponding expenditure may occur at any time. One circumstance contributing to this necessity is that financial measures remain in force for 2 years after the year for which they were passed, and that during a long period the various branches of expenditure undergo considerable alterations and modifications. The system of transferring credits from one department to another is equally objectionable, as it affects two branches of the budget, the one from which the sum is taken and that to which it is transferred. It is liable to abuse and may be prejudicial to branches of the public service amply provided for in the estimates. The system was condemned in France by M. Fould, and has been abandoned in the financial system of that country.

As regards supplementary credits it is further shown that Spain has not had undue recourse to this form of finance as compared with other countries. According to a statement showing

the amount of the estimates and supplementary credits in France and Spain during each year between 1880-90, the average percentage of supplementary credits amounts to 6·24 per cent. in France and 5·08 per cent. in Spain.

After citing Belgium and England as instances to show that in the best financially administered States supplementary credits are found to be indispensable, it is pointed out that habitual recourse on a large scale to extraordinary measures, the details of which are not given in the estimates, has provided means for satisfying the requirements of the State, but only at the expense of sacrificing the future of the Treasury by an increase of the Public Debt.

During the 40 years under review it has been found necessary to realise the sum of 2,525,483,585 pesetas (101,019,340*l.*) in addition to that of 918,796,146 pesetas (36,751,844*l.*) from ordinary resources as fixed in the estimates. The result being that the annual sum which it has been found necessary to raise in order to relieve the deficit amounts to or exceeds 86,000,000 pesetas (3,440,000*l.*), and even if the further extraordinary measures are not included, and account is only taken of loans and forestalments of revenue amounting to 3,202,530,548 pesetas (128,101,220*l.*), there still remains a deficiency of revenue or increase of expenditure amounting to 80,000,000 pesetas (3,200,000*l.*) annually, a sum which may be taken as the average deficit in the estimates between 1850 and 1890.

It is further pointed out that the sums actually realised vary very considerably from those estimated. In order to illustrate this fact the following table is given showing that during a period of 40 years out of 44 sources of revenue only 4 have yielded more than the sum estimated, 11 over 90 per cent., 12 between 80 and 90 per cent., 4 between 70 and 80 per cent., 7 between 60 and 70 per cent., and 6 have realised less than 60 per cent. These groups are given in the following tables:—

GROUP 1.

Item.	Description.	Per Cent.
1	Interest of 6 per cent. on funds diverted from their legitimate purpose	139·07
2	Eventual receipts from all sources..	111·71
3	Arrears up to end of 1849	101·47
4	Lotteries	100·96

Group 2.

Item.	Description.	Per Cent.
1	Sums realised from the redemption of military service ..	98·91
2	Tobacco	96·86
3	Issue of Public Debt..	96·77
4	Custom-house receipts	96·36
5	Tax on salaries, and provincial and municipal charges, and on registration fees of national property	96·63
6	Tax on real property	93·77
7	Tax on transfers of property	93·51
8	Salt	92·98
9	Tax on railway fares..	92·41
10	Taxes on the free ports in the Canaries	90·25
11	Mines at Linares	90·19

Group 3.

Item.	Description.	Per Cent.
1	War indemnities	89·16
2	Profits from State property..	88·90
3	Stamps	88·36
4	Gunpowder	87·46
5	Money orders issued by the Treasury	87·08
6	Industrial Tax	86·15
7	Tax on mines..	84·32
8	Tax on articles of consumption	83·40
9	Fees paid for custody of deposits	81·94
10	Sale of property formerly held in mortmain	80·64
11	Tax on titles of nobility	80·99
12	Sums refunded	80·57

Group 4.

Item.	Description.	Per Cent.
1	Tax on native-grown sugar	79·05
2	Mints	78·89
3	Cruzada*	76·83
4	Consular dues	75·83

* For an explanation of this tax see note on page 21.

Group 5.

Item.	Description.	Per Cent.
1	Miscellaneous State dues	79·05
2	Riotinto mines	63·75
3	Surplus from colonial treasuries	62·44
4	Direct taxes finally paid-up..	62 32
5	Arrears	61·04
6	Official publications	60·70
7	Mines of Almaden	60·57

GROUP 6.

Item.	Description.	Per Cent.
1	Compensation fund	55·27
2	Personal certificates	53·01
3	Mines of Alcaraz, Falset, and Marbella	51 97
4	Indirect taxes finally settled	51·12
5	Promissory notes negotiated	49·10
6	Special tax on alcoholic drinks	29·26

After showing that the revenue estimated in the budget is never actually realised, he proceeds to point out that the actual expenditure invariably exceeds the estimates, thus increasing the deficit which has to be provided for sometimes by supplementary and extraordinary credits; sometimes, when it has been found impossible to estimate the expenditure accurately, by credits granted on the express condition that they may be increased until the necessary sum has been obtained. Moreover, in some cases the State departments have exceeded their share of the estimates, and it has been found necessary to apply to the Cortes for a Bill of Indemnity.

It is then shown that the total supplies, ordinary and extraordinary, granted during the 40 years under review amounted to 28,919,026,125 pesetas (1,156,761,045*l.*), the total sums spent having been 27,495,708,799 pesetas (1,099,828,351*l.*), thus leaving a residue of 14,200,317,326 pesetas (56,932,694*l.*).

A digression here follows showing the necessity for remedial measures, and pointing out the influence hitherto exercised by political disturbances. It will be unnecessary, in view of the system adopted by the present Finance Minister in framing the estimates for 1894–95, to follow the writer through his denunciation of the system hitherto followed, known as the valuation system, which afforded a means of balancing a budget by an illusory calculation of increased receipts. In the automatic system now adopted, estimates are based on the most recent data available, which is shown to be the recognised practice in England, Italy, Germany, and the United States, where the introduction of the estimates coincides almost exactly with the commencement of the financial year.

Returning to the question of Spanish finance (and it must be remembered that the following is taken from a Spanish source) it is not only a reform in the system which is advocated, but also the employment of none but honourable and intelligent administrators, as the services of men combining the necessary qualifications are not wanting—as otherwise the finances of an entire province may be put into great disorder by a bad selection. The efforts of a Government assisted by those of the Cortes are manifestly thrown away if the task of carrying out the result of their calculations is entrusted to incompetent persons.

The more important faults and defects which have been the

permanent cause of deficits are stated to be delusive estimates of revenue, the result of the valuation system, evasion, additions of all kinds to the original credit, and also extraordinary credits.

The remedies for these sources of financial difficulty are stated to be: the rigorous application of the automatic system with regard to revenue, taking the accounts of the previous year as a basis of calculation; the rendering a strict account of the expenditure of each department; the limitation as far as possible of supplementary and extraordinary credits; and, finally, the elimination of every initial deficit.

The following are the principal taxes and sources of revenue: the tax on real property, agriculture, and cattle-breeding; tax on industry and commerce; estate duties and the tax on the transfer of property; tax on personal certificates; tax on salaries; tax on articles of consumption; tax on railway passengers and merchandise; stamps; revenue from tobacco; revenue from lotteries.

Besides these there are the tax on mines; fees paid on Castilian titles and patents of nobility; subsidies from the free ports of the Canaries; consular dues; the tax on sugar grown in Spain; Treasury money orders; Cruzada.*

The reason given for the omission of any reference to the revenue derived from customs is that it would be useless labour to notice all the changes which have been caused by the various administrations of the custom-house; and, from another point of view, it would have been impossible to enter into the question at all fully without plunging into a discussion relating to the various systems of policy by which the Government has at different times been guided.

A further point to which attention is expressly directed is the considerable increase shown in each decennial period of wealth subject to taxation.

This amounted to :—

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
In 1850	571,812,715	22,872,508
1860	692,380,076	27,695,203
1870	755,709,933	30,228,397
1880	777,694,168	31,107,766
1890	844,133,195	33,765,327

* The impost bearing the name of Cruzada dates from the Middle Ages, when spiritual privileges were granted by the popes to those who contributed money for the crusades. The first Bull of the Cruzada was granted by Julius II. to Ferdinand and Isabella in 1509, and is renewed annually.

The tax soon came to be administered by the State, but after many changes is now administered by the Archbishop of Toledo as an ecclesiastical revenue, a fixed sum being paid to the State. The receipts are derived from the sale of licenses and privileges, such as that of eating meat on Fridays throughout the year, excepting in Lent. They amount to a considerable sum, which after providing for the contribution payable to the State is employed for the repair of churches and other ecclesiastical purposes.

Showing an increase between the first and last years named of 272,320,480 pesetas (10,892,819*l.*) or 47·62 per cent. A similar increase is observable with regard to "valores liquidados," sums obtained at the close of the financial year, which increased until 1889–90, in which year there was a slight diminution:—

Year.	Amount.	
	Currency.	Sterling.
	Pesetas.	£
1850	75,032,020	3,001,280
1860	98,954,779	3,958,191
1870	139,009,545	5,560,381
1880	165,743,958	6,629,758
1890	165,662,472	6,626,498

The difference between 1850 and the last year given being 90,630,452 pesetas (3,625,218*l.*), which represents 120·78 per cent.

Taking the revenue realised in 1889–90 together with the fact that the area of Spain is 50,451,638 hectares (124,671,042 acres), the average taxation per hectare is shown to be 3 pesetas 28 c. The province of Madrid contributing the largest portion, 14 pesetas 42 c.; that of Soria the lowest, 1 peseta 20 c.

A very full account is given of the origin and history of the principal taxes, showing the alterations which have at various times been introduced.

Tax on real property, agriculture, and cattle-breeding. Previously existing taxes.

Of these one of the most important is the tax on real property, agriculture, and cattle-breeding. It was originally called the territorial tax. As time went on it received its present appellation which corresponds more exactly to the articles taxed. It was established by the law of May 23, 1845, with the object of consolidating a number of previously existing taxes. These were nine in number, viz.:—

1. That on straw and implements originally levied in kind for the requirements of the army.

2. Civil fruits, a tax imposed in 1785 to compensate the Treasury for sums lost by the diminution in value of provincial rents.

3. The portion of the land tax originally due to the Crown of Aragon.

4. The tax for maintenance and repair of barracks formerly included in No. 1 and paid in kind.

5. Succession dues.

6. Manda pia forzosa, a tax of 12 r. (about 3 pesetas) imposed on wills and legacies on every succession in Spain, and 60 r. (15 pesetas) in the colonial possessions for the assistance of prisoners, widows, and others affected by the Napoleonic wars.

7. The sums payable by the Basque provinces.

8. The sums payable to the clergy after the abolition of tithe in 1837.

9. The payment made by the province of Navarre since 1841, as also the quota paid in lieu of tithes for public worship.

Form assumed in 1845.

The vicissitudes through which this tax passed before it assumed its final shape in 1845 were many and various. Property subject to it was at that date described as follows :—

1. Land of every description, whether cultivated or uncultivated, or used for purposes of recreation or luxury.

2. Urban and rural buildings, quit rents, tributes, rents, sub-rents, pensions, and any other description of perpetual charge including long leases on property.

3. Salt mines worked by the proprietors and those leased by the Government. Labourers and cultivators are also subject to the payment of this tax on their net profits, and owners of cattle not used for labour on the profits of cattle-breeding.

The necessity of exemptions soon became apparent, and permanent ones were immediately made for cemeteries, land attached to religious houses, buildings, and gardens belonging to the Crown, common land belonging to villages, public roads, ports, and canals, houses belonging to foreign embassies (whose Governments show the same consideration towards Spain). Temporary exemptions were also made in the case of land being prepared for cultivation.

The amount of the tax was fixed by an assessment, "ley de cupo," for each province. The provincial deputations fixed that of each province, and the municipalities and skilled assessors that of each tax payer, the landowners being collectively responsible in each province and village for the entire payment of the sum fixed. By this means the Treasury would never suffer loss, as the sum falling short of what is required would be redistributed amongst all the contributors.

The principal difficulty with which all Governments have had to contend is that of ascertaining the real taxable value of property liable to taxation, owing to the prevalance of evasion, "occultation."

System adopted in 1885.

The system as fixed by the law of September 30, 1885, provides that this tax being calculated at a fixed sum by the State, the amount by which it falls short will be carried over to the accounts of the following year to be levied either on the taxpayers of a special municipal district, or on those of an entire province according to the circumstances of the case as decided by local commissioners or the Cortes. The contribution of each province, on the basis of its individual wealth, is fixed in the budget by the Finance Minister with the sanction of the Council of Ministers; the portions for which each village or municipal district is liable being fixed on the basis of the net taxable property by the commissions of the provincial or administrative capitals, or in other districts by the official valuers, the approval of these valuations always resting with the central administration. The collection of this tax is confided to the executive tax gatherers and agents in accordance with the law of 1888; the duty of the former being to collect the ordinary tax, and that of the latter to exact payment of arrears.

Tax on industry and commerce.

The tax on industry and commerce has also undergone many and various changes before assuming its present form.

Ancient history.

When the seignorial rights or ancient dues of the Crown proved insufficient to meet the expenditure of the State, more especially at the time of the wars with the Moors, the kings had recourse to the Cortes, which granted what was necessary to meet the requirements of the moment. This happened so frequently that these sums gradually took the form of a permanent tax payable every three years under the name of "Servicio Ordinario de Monedas," and being levied on farms, commerce, industry, professions, and arts may be considered to be the origin of the tax. There were, of course, the usual exemptions in favour of the nobility, clergy, officers of the Royal household, the villages bordering on the Moorish possessions, the doctors of the Universities, and newly married people for two years. The tax was collected by the Procurador del Rei who received 1½ per cent. as his share. It gave rise to many complaints by reason of its uncertainty and injustice, and was finally abolished in 1795 by Charles IV.

When the provincial rights of Aragon, Catalonia, Valencia, and Majorca were abolished by Philip V, and the tributary system of Castile was substituted, the tax was levied under the generic name of "equivalente." In Majorca, however, it was named "talla"; and in Catalonia, "catastro."

Law during French occupation.

By a decree of Joseph Bonaparte, dated November 19, 1810, everyone carrying on any business, commerce, art, or profession was obliged to obtain a license or patent.

A tax was attached to these patents, and also a small sum divided between the municipality and the secretary by whom they were issued. The tariff by which the tax was fixed was divided into two groups, one comprising the industries and professions, paying the same amount in all the cities of the kingdom, the other paying an amount varying according to the class of town or its industries, to which a third was afterwards added, comprising shops for the sale of meat, fish, vegetables, &c., the sums payable being assigned under three heads according to the importance of the locality. The classes of towns were five in number:—(1) Madrid; (2) provincial capitals and seaports inhabited by foreigners; (3) leading provincial towns; (4) places of sufficient importance to have a mayor or judge; (5) the other villages of the kingdom.

The classes of contributors were 10 in number, each paying a separate quota corresponding to the description of township to which they belonged. In these 10 classes were included all the industries, professions, &c.

On the departure of the French their decrees became null, but the principle was re-introduced, and the tax with modifications remained more or less in this form until 1847. By Royal Decree of September 3, in that year, direct taxation according to the system described was abolished, and the system of "agremiacion," or associations nearly corresponding to guilds in other countries, established. The duties were levied on the basis of population upon industries and professions coming under tariff 1 of the previous system, and without reference to population on the classes

System of taxation by guilds introduced in 1847.

comprised under the tariffs 2 and 3. All those exercising the same trade or profession were to form a guild or association for the payment of the tax. The members of the guild were collectively responsible for the payment of the sum allotted to them, but could distribute it proportionally at their own discretion amongst the various categories of industry comprised in their association within certain fixed limits. Certain persons, elected by members of the guild with the approval of the Government, for the purpose, became individually responsible for the payment of the tax into the Treasury, and against them proceedings could be taken in case of default. Every one exercising a profession or calling without having obtained a certificate proving him to be enrolled as member of a guild was liable to a fine of double the amount due, which could be exacted by distress, unless within 4 days a person could be found belonging to a guild to give security for him. The tax, with certain changes in the classification of industries, has remained in force upon this basis up to the present day. Every Spanish subject or foreigner carrying on any trade, profession, business, art, or offices is subject to it.

Present system.

It consists (1) of a fixed sum to be paid to the Treasury according to fine tariffs; (2) of the additional duties authorised by law in favour of provinces and municipalities, the maximum being 16 per cent.; (3) 6 per cent. on the foregoing sums which is distributed as follows:—1 per cent. on the net sum paid into the Treasury, half of which goes direct to the Treasury for expenses of registration and half to the local alcaldes and secretaries of municipalities employed in the work. For the collection of the tax a proportional percentage is paid according to the district, the remainder being applied to satisfy the expenditure necessary for developing the tax and covering as far as possible the sums in default.

Each year a register is drawn up in duplicate of the individuals subject to the tax in each village, divided according to tariffs, classes, numbers, and trades, showing the amount payable by each.

It will be unnecessary to describe the exact machinery employed in the collection of the tax which was in the hands of syndicates representing the several associations or guilds according to the number of their members. They decided the amount to be paid by each member, and the decision was laid before an assembly of the guild who decided any disputed assessment by a majority of votes.

Any attempt to defraud the State on the part of those liable to the tax or those entrusted with its collection is punishable by fine, which can be doubled in the case of a second offence; on the other hand, syndics and other officials are entitled to two-thirds of any fines they may be instrumental in getting imposed.

The history of the tax on industry and commerce has now been traced through its successive stages. The systems successively in force have all been directed to the establishment of a just proportion payable by individual contributors, but no attempt has been

made to fix the sum payable by different industries. The quotas hitherto paid by them bear, however, no relation to their individual production.

Transfer and Legacy Duty.

"Derechos Reales y transmision de Bienes." Early origin.

The tax imposed on transmission of property by descent, or transfer in other ways, is of very ancient origin, its character as a fixed and ordinary tax dating from 1491, in the time of Ferdinand and Isabella, previously to which date it had existed, but only as an extraordinary tax for special purposes, such as the fortifications of Algeciras in 1341, of Gibraltar in 1349, and the war with Portugal in 1388.

In 1798 the foundation was laid of the tax in its present form, establishing the scale of taxation leviable in accordance with the various degrees of relationship in the case of hereditary transmission of property.

The sums payable under the tax have varied considerably at different periods, having been in the earliest times of 5 per cent. on inheritances and on the value of property bought or exchanged. Philip II raised it to 10 per cent., and by Royal Decree of 1785 it was reduced to 7 per cent.

Various measures of an experimental nature were passed in connection with this law, amongst them one called the "Derecho de Hipotecas," or tax on mortgages, consisting of ½ per cent. on all classes of donations, sales, and transfers of landed property.

Several important changes were introduced by the law of 1867, one being the imposition of a succession duty on inheritance in a direct line, and the increase of the scale of taxation on transfers to 3 per cent. The succession duty has been taken off and re-imposed more than once, and in 1873 the tax was made to include various forms of contract which had hitherto escaped taxation, thus extending the basis of the tax and introducing the name which it now bears of the tax, "Derechos Reales y transmision de Bienes."

Finally, by the law of December 21, 1881, which adopted the principle that no one should enjoy exemption from the tax, the State imposed a duty of 10 cents. per 100 pesetas on "conceptos" (revenues) which were formerly exempt, at the same time modifying the scale in succession duties and "deeds of gift," and also on pensions.

The latest reform was introduced by the law of 1885–86 regulating the scale of payment required in the case of mortgages raised as guarantees by mercantile companies of all classes.

From the foregoing it appears that this tax is not only one of the most ancient sources of revenue, but also (although obnoxious to many economists as a tax on capital rather than income) has most steadily developed and increased in importance. Its maintenance is justified by the example of England, France, and finally

Italy, in which countries the tax on registration has been finally adopted.

There are, therefore, three distinct periods in the history of the tax, viz., from 1491 to 1845, which may be called its ancient history; secondly, the more modern period from 1845 to 1872; and thirdly, the period since that date, during which it has been modified to its present form.

"Cedulas Personales." Personal certificates.

Long before the change in the system of public administration, which took place in 1845, there were certain documents of the nature of passports which, by reason of their similarity to the existing system of personal certificates, may be considered to be the forerunner of the tax bearing that name.

Originally for purposes of police.

These documents were at first instituted for purposes of police, and although they brought in something to the Treasury, the sum was so insignificant as to be hardly taken into account for purposes of revenue.

At present entirely for purposes of revenue.

Under the present system the cedulas are exclusively for purposes of taxation, and the tax is farmed out by the Ministry of Finance.

Certificates of "vecindad" (domicile) lasted from 1854 to 1870, those of "empadronamiento" (granted to heads of families) from 1870 to 1873, the personal since 1874. On the abolition of the passports formerly necessary for natives of Spain moving from one part of the country to the other, the "cedulas de vecindad" were, like those of "empadronamiento," granted to heads of families, the charge being 1 r. ($2\frac{1}{2}d.$) for himself and each member of his household requiring them, exceptions being made in the case of pilgrims, workmen, widows, and orphans in receipt of a maintenance of less than 1,500 reals ($15l.$), and soldiers.

When the designation of the tax was changed in 1870 the "empadronamiento" was made more clearly to express the principle of taxation involved, a classification of the population of the towns and villages was introduced under three categories, the possession of a "cedula" by every individual over 14 years of age became compulsory, the only exceptions being nuns in religious houses and prisoners undergoing sentence.

The change of Government in 1873 brought about the abolition of the tax, but it was re-introduced in the following year.

The price of cedulas has varied considerably, being calculated both according to the scale of individual incomes and also with regard to the various classes of towns as shown by population. This classification, however, has also varied considerably, the number having been increased at various times to 9, 10, and 11.

Present system. Two tariffs, 11 classes.

Tariff I commences with a tax of 100 pesetas ($4l.$) charged to persons paying 5,000 pesetas ($200l.$) in direct taxes, or enjoying an annual income of 30,000 pesetas ($1{,}200l.$), whether derived from official salaries or from private means, as first-class cedulas, graduated down to 50 cents. ($5d.$) in Class XI, charged to labourers, servants, and their children over 14 years of age.

Tariff II is graduated on a similar scale under 11 classes, but applies to cedulas granted to householders. It is calculated on

the annual rent of premises varying from 7,500 pesetas (900*l.*) in Madrid to 50 pesetas (2*l.*) or less in villages of less than 5,000 inhabitants.

This is how the law at present stands, the municipalities being obliged to compile registers and to promote the development of the tax, while maintaining the right to impose an additional charge of not more than 50 per cent. on cedulas to meet the expenses incurred. Military men are charged under Class IX on incomes of from 750 pesetas (30*l.*) to 1,250 pesetas (50*l.*) per annum. The formation of group classes in provincial capitals is in the hands of the General Administrator of the Province, and in villages in that of the municipalities.

Tax on salaries. Date of origin.

The tax on salaries appears to have originated in the time of the War of Succession, when it was 10 per cent. on the salaries of employés in the tribunals and public offices. It was subsequently extended by Charles IV to all classes indiscriminately. Ferdinand VII reduced the tax to 4 per cent. imposed only on salaries exceeding 12,000 r. (120*l.*).

Abolished in 1857, revived in 1876.

Various abuses crept in which led to its abolition in 1857. It was revived in 1876, when the rate was fixed at 5 per cent. on all salaries or rents paid by the State or by provincial or municipal bodies, as well as on shares of banks and companies constituted with the approval of the State. Various modifications and exemptions continued to be made in favour of one class or another, until in 1876 a new scale was fixed for the taxation of the military and civil functionaries as follows :—

Scale fixed in 1876.

	Per Cent.
Salaries up to 1,500 pesetas	15
From 1,500 to 10,000 pesetas	20
From 10,000 pesetas and upwards	25

The "clases pasivas" (pensions, &c.) were also to pay 25 per cent., and the clergy, after certain formalities, were also expected to contribute the fourth part, or 25 per cent., as a donation from their personal receipts. In 1881 their contribution was, like all others, reduced to 10 per cent., while officers of the army and navy on active service, as well as the rank and file of both services, were altogether exempted. Comptrollers or registrars of property, in addition to the tax on salaries, have to pay a special one on the fees which they receive, assessed on the following scale, according to the class of locality which they administer :—

	Per Cent.
Classes 1 and 2	6
Class 3	5
„ 4	4

Tax on articles of consumption. Remote origin of.

The origin of this tax appears to be lost in antiquity, traces of it being certainly discernable in the time of the Romans. It is, however, distinctly alluded to in 1341, in the reign of Alfonso XI, in connection with expenditure at Algeciras, Gibraltar, in common with other indirect taxes. which assumed very large proportions later under the domination of the House of Austria, in order to provide for the expenditure caused by the wars. The contribution was voted by the Cortes under the comprehensive name of "millones," and was raised principally upon articles of consumption. This tax, incorporated as it was with the general system of indirect taxation, may be said to have exercised a baneful influence on the development and prosperity of the country. It formed part of one vast system of corruption (not peculiar at that period to the history of Spain), and the sale of offices, villages, regiments, and places at last led to an outcry on the part of the people against the expenditure of the Royal Household, and the costly wars which impoverished the country and paralysed industry, but it resulted only in the introduction of some palliative measures, such as sumptuary laws, the prohibition of the exportation of gold and silver, the arbitrary reduction of interest due, and amongst remedies that of giving a fictitious double value to the copper currency.

Subsequent changes.

Reforms were introduced by Ferdinand VI and Charles III, and in 1813 the tax was abolished, only, however, to be re-introduced in 1817 under another name and form, resembling to a great extent the modern continental "octroi." The tax has retained much the same form to the present day though with various modifications, the most important reforms having taken place in 1854, 1868, and 1874. It has become too thoroughly engrafted in the fiscal system of the country for a substitute to be easily found, and Spanish statesmen have considered it more expedient to reform and extend an established tax than to create a new one.

System introduced in 1888.

The bases for levying the tax as it at present stands were laid down in 1888 as follows. The municipalities of provincial capitals, those of the seaports of Cartagena, Gijon, and Vigo, and of towns with a population of more than 30,000, may register themselves or not as they please on the terms fixed by the Treasury. In case they do not accept the Government tariff, the Government may either administer the tax themselves or farm it out for the sum they may consider just, an expedient which may also be adopted in case a municipality having accepted the Government assessment should fail to levy it satisfactorily.

In towns with a population of less than 30,000 inhabitants the Government tariff, "encabezamiento," is obligatory, the duties

levied being carefully tabulated according to a fixed scale, upon which, however, the municipalities have the right to levy as much as double if they see fit.

By the law of 1889 a special tax was passed of 25 pesetas per hectolitre on foreign spirits, and also on alcohol of Spanish origin, whether produced for industrial purposes or for private consumption, on the following scale:—

	Per Hectolitre.
	Pesetas.
In townships up to 5,000 inhabitants for each (centesimal) 100th degree	35
5,000 to 12,000	40
20,000 and upwards	45
Cartagena, Vigo, and Gijon	55

Its importance as a tax.

In conclusion it only remains to be said that whenever the Government has abrogated this tax it has been immediately re-imposed by the municipalities, not only by express authority from Government as in 1870, but also in 1854–55, when a certain latitude was allowed to them as to the means of raising money to meet their obligations.

Revenue from tobacco. Introduction into Europe.

The account given of the revenue from tobacco is of some historical interest. The first European who became acquainted with the plant is stated to have been a Spaniard named Pane, who remained in San Domingo on Columbus' return to Spain after his second voyage. He found it used by the natives principally as a medicine.

The first specimens of the plant were sent by him to Seville in 1499, but its use in Europe was mainly due to Jean Nicot, a Frenchman of Nîmes, who was French Ambassador in Portugal in 1560. Its introduction into England by Sir W. Raleigh who brought it from Virginia dates from 1585, soon after which time its cultivation was carried on in Holland and other parts of Europe.

No exact record seems to have been kept showing the development of the consumption of tobacco in Spain, but with regard to France the following table has been published showing the value of tobacco used in that country since its introduction:—

Year.	Value.
	Francs.
1636..	50,000
1750..	16,000,000
1815..	27,000,000
1844..	80,000,000
1850..	122,000,000
1865..	200,000,000
1868..	247,000,000
1869..	255,000,000
1870..	260,000,000

Increased consumption in France.

Its importance as a source of revenue was discovered in 1611 when it was made subject to a duty of 15 per cent. Twenty years later the right of collecting the tax was farmed out and a monopoly created, but it was not till 1730 that the administration of the tax was placed entirely in the hands of the Minister of Finance, which resulted in a very considerable increase of revenue. It was used as a means of raising funds for special objects, records being found of 2 r. being imposed on each 1 lb. of tobacco for such objects as the building of a hospital or making additions to a palace. At the commencement of the present century a considerable decrease is observable from this source of revenue, in consequence of the unsettled state of the country resulting from the wars in which it was involved.

Tax on, first imposed in 1611.

The stringent measures taken in 1845 for the prevention of contraband trade led to a considerable increase in the receipts from this source of revenue until 1866, in which year the importation and sale of tobacco from Cuba and Porto Rico were declared free under certain conditions, the object being to encourage trade with the Antilles. This system led to considerable abuses, owing to the encouragement given to smuggling by the institution of a number of private manufactories. So that in 1874 the Government re-established the monopoly, thus closing the private shops. This measure was followed in 1878 by the decree abolishing the privileges of the Basque Provinces, one of which was the free importation of tobacco, which had led to a very considerable contraband trade being carried on with the rest of the Peninsula.

1886, tobacco from Cuba and Porto Rico declared free.

Since April, 1887, the monopoly of the manufacture and sale of tobacco in the Peninsula, Balearic Islands, Ceuta, and other Spanish Possessions in the North of Africa has been farmed out to a company for 12 years, a step which has hitherto been attended with satisfactory results. The basis of the rent paid by the company was fixed at 90,000,000 pesetas (3,600,000*l.*), the State also receiving a share of 50 per cent. in the eventual net profits.

In 1887 monopoly farmed out for 11 years.

State lotteries were first introduced into Spain by Royal Decree in 1763, when Charles III mortgaged his royal property as security for payment of the prizes, and arranged that if there were any surplus it should be applied to the benefit of hospitals and other public or religious works.

Lotteries introduced in 1763 by Italians.

It at first assumed a somewhat complicated form devised by the Court of Rome, and was established at San Ildefonso under a Neapolitan named Peya, who appointed administrators in the provinces, and it acquired considerable development in that and the succeeding reign. The system adopted, however, afforded opportunities for gambling on such a large scale that the abuse led to the suppression of that form of lottery in 1862. The benevolent object of the institution had been early lost sight of, although, at the beginning of the century, certain sums were distributed amongst various charitable institutions. The income derived by the State was also considerably below what it should have been. Out of a total revenue, in round numbers, of 12,000,000 reals (120,000*l.*) in 1788, the share reverting to the Treasury was only 4,000,000 r. (40,000*l.*), and in 1807 out of a total of 28,000,000 r. (280,000*l.*), the net profit to the Treasury was only 11,000,000 r. (110,000*l.*).

Great abuses in administration.

During the Napoleonic Wars, however, a much less objectionable form of lottery had meanwhile come into existence, originating in Mexico, being called the "modern" in contradistinction to the primitive or original form.

New form introduced about 1810.

This is strictly under Government control, 75 per cent. of the sum raised by tickets being given in prizes and 25 per cent. going to the Treasury. However injurious its effects may be, by the temptation offered to the poorest classes of the people to buy fractions of tickets, it must be infinitely less demoralising than the original system which degenerated into an intricate game of chance leading to endless corruption and fraud, mainly in the interest of foreign adventurers, who had originated and acquired control over the system, whereas in the modern system it is managed by officials at fixed salaries regulated by law.

It is interesting to note that both Philip II and, notwithstanding his French origin, Philip V condemned the practice of raffling for objects of value. The former decreed that articles raffled for should be confiscated as well as the stakes, and a fine imposed.

Until recently it had been customary to ask permission from the Minister of the Interior for private lotteries, which was only given on the express condition that a fourth part of the proceeds should be paid in to the general lottery fund, a regulation which was subsequently rescinded in the case of raffles for hospitals and charitable institutions.

The great improvement in the management of lotteries may be gathered from the fact that in 1890–91 the general expenditure on lotteries amounted to 2·62 per cent. on the receipts.

	Amount.		
	Currency.		Sterling.
	Pesetas.	Pesetas.	£
Receipts..	..	79,331,343	3,173,253
Expenditure—			
Central Administration ..	91,500		
Provincial Administration ..	1,892,430		
Office expenses	96,324		
		2,080,254	83,210
Net receipts	..	77,251,089	3,090,043

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FOREIGN OFFICE.

1894.

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No. 1445.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE AND FINANCE.

SPAIN.

REPORT FOR THE YEAR 1893

ON THE

TRADE, &c., OF THE CONSULAR DISTRICT OF MALAGA.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1282.

Presented to both Houses of Parliament by Command of Her Majesty, AUGUST, 1894.

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1399.	Dunkirk	1d.
1400.	Amoy	1½d.
1401.	Tainan	1d.
1402.	Ichang	1d.
1403.	Aleppo	1d.
1404.	Madrid	1d.
1405.	Newchwang	1d.
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1407.	Pakhoi	1½d.
1408.	Hankow	1d.
1409.	Amsterdam	1d.
1410.	Copenhagen	½d.
1411.	Damascus	1d.
1412.	Chefoo	3d.
1413.	Swatow	1d.
1414.	Mannheim	1½d.
1415.	Fiume	2d.
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1417.	Söul	1½d.
1418.	Beyrout	1d.
1419.	Berlin	1½d.
1420.	Nice	3d.
1421.	Yokohama	1½d.
1422.	Maracaibo	1d.
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1429	Meshed	1d.
1430.	Copenhagen	½d.
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1432.	Hamburg	2½d.
1433.	Brindisi	2½d.
1434.	Gothenburg	2d.
1435.	Kiungchow	1d.
1436.	St. Petersburg	½d.
1437.	Malaga	1d.
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1440.	Tabreez	½d.
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SPAIN.

MALAGA.

Mr. Finn to the Earl of Kimberley.

My Lord, *Malaga, July* 5, 1894.

I HAVE the honour to enclose my Annual Commercial Report with its enclosures and annexes.

I have, &c.
(Signed) ALEXANDER FINN.

Report on the Trade and Commerce of Malaga for the Year 1893.

ABSTRACT of Contents.

	PAGE
Malaga—	
Shipping	2
Rates of freight	2
Emigration	3
Mining: iron	3
Nickel	3
Table showing mining production	4
Increase in imports	5
Decrease in imports	5
Exports, increase	5
„ decrease	5
Wines	5
Viniculture	6
Grapes	6
Raisins	6
Olives and olive oil	6
Wheat	7
Chick peas	7
Indian corn	7
Barley	7
Codfish	7
Silk culture	8
Onions	8
Pomegranates	8
Jordan almonds	8
Malaga as a health resort	8
Census statistics	8

ABSTRACT of Contents—continued.

	Page
Malaga—continued—	
Annexes	
A.—Return of British shipping	10
B.—Return of imports	11
C.—Return of exports	13
D.—Table of production, cost, and value of olive oil in Spain	15
Vice-Consuls and Consular Agents' Reports—	
Adra	16
Aguilas..	17
Almeria	18
Cartagena	27
Linares..	31
Mazarron	34

Shipping.

Though small, I am happy to be able to announce that there was an increase in the amount of British shipping to this port during the past year. There were in 1891 168, in 1892 186, and in 1893 192 British ships of all sorts entered and cleared at Malaga, with a tonnage of 147,182 tons.

The number of ships entered and cleared in this port in 1893 being :—

Nationality.	Number of Vessels.
Spanish	1,593
English	192
French	96
German	35
Swedish and Norwegian	37
Danish	23
Italian	14
Dutch	12
Russian	12
Portuguese	3
Austrian	3
United States of America..	2

Rates of freight.

The only difference in the current rates of freights at Malaga in 1892 and 1893 was a reduction in those of the United States of 10*s.*, *i.e.*, 1*l.* 10*s.* instead of 2*l.*

For—	Rates of Freight.
London and Liverpool	1*l.* 5*s.* and 10 per cent.
Dublin	2*l.* and 10 per cent.
Leith	2*l.* 5*s.* and 10 per cent.
Glasgow	1*l.* 10*s.* and 10 per cent.
Havre	35 fr. and 10 per cent.
Marseilles	16 fr. and 10 per cent.
Amsterdam	35 fl. and 10 per cent.
Hamburg	25 marks in full.
St. Petersburg	30 marks in full.
New York	1*l.* 10*s.* and 10 per cent.

There has been very little this year, though I am informed that unless both trade and agriculture improve considerably another exodus may very shortly be expected to South America. **Emigration.**

The production of iron ore in this province is capable of being considerably increased, many rich lodes known to exist in the western part of the province and on the sea coast being still unworked. I am given to understand that those of the Robledal and Corchadillas, Las Covatillas, Cerro Lamino, Meseta de Salinas, and Apeadero de la Peña, besides several denounced by the Algeciras-Bobadilla Railway Company, are capable of very considerable production. **Mining: iron.**

The nickel mines of Carratraca are also, I am informed, getting on satisfactorily. **Nickel.**

I subjoin a table showing the mining and metallurgic production of the province of Malaga in the years 1892 and 1893:—

TABLE showing the Mining and Metallurgic Production of the Province of Malaga during the Years 1892-93.

Year.	Branch of Working.											Branch of Profit.	
	Magnetic Iron.				Lead.		Nickel.		Steatite.		Total Value of Mining Production during the Year.	Wrought Iron.	Value.
	Grees.		In Sand.										
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.			
	Tons.	Pesetas c.	Tons.	Pesetas c.	Tons.	Pesetas.	Tons.	Pesetas.	Tons.	Pesetas.	Pesetas c.	Tons.	Pesetas.
1892	55,623	302,5•5 0	8,•69•1	43,568 40	10•5	785	...	...	350	7,000	353,938 40	2,130	745,500
1893	14,425•6	57,702 40	4,683•5	18,735 20	10	400	30•9	4,585	200	4,000	85,422 60	740	259,000

NOTE.—The value given for the ore is at the mouth of the mine, and for the wrought-iron in the foundry.

According to the returns (see Annex B) the increase in imports has been principally in coals and wheat; of the former nearly five times the amount of the previous year was brought in, while the increase in the import of wheat was doubled. Increase in imports.

There were sad deficiencies in the import returns for this year. There was a tremendous falling-off in alcohol, in raw cottons, in chemicals, charcoal, guano, cast-iron and machinery, furniture, paper, petroleum, and woven goods. Decrease in imports.

The principal increase in the exports was in olive oil (which was trebled), garlic, almonds, orange peel, lemons, and lead, while a decrease is noticeable in olives, aniseed, canary seed, cocoa shell, chick peas, oranges, and wine. Exports: increase. Exports: decrease.

A local paper, in some interesting notes on the production of wines in the whole of Spain, tells us that the loss in the first quarter of 1893, as compared with 1892, was 44,000,000 pesetas on ordinary wines, and it states that the official statistics are based on the values adopted for 1892, but that these should be rectified, as they were estimated on the values of 1891, *i.e.*, 15 pesetas per hectolitre, whereas the official values for 1892 were really only fixed in June, 1893, by the tariff committee at 18 pesetas. These values represent the average price delivered at ports and frontiers, so that for shipments the official value is f.o.b. The depreciation in the aforesaid three months came to 1,777,993 hectolitres; but then another element has to be taken into consideration, that is, that during the month of January, 1892, there was an excess of exportation, so as to benefit by the short time remaining until the expiry of the treaty with France; so, by comparison, we see that whereas in January, 1891, 992,515 hectolitres, worth 22⅓ millions of pesetas, were exported; January, 1892, showed 2,815,460 hectolitres, whose value was 70⅓ millions of pesetas, or 1,822,945 hectolitres in favour of 1892, or, assuming the figures to be correct, and taking the returns for the first quarter of 1891 (*i.e.*, 1,442,658 hectolitres) as representing a normal export, there was an increase in favour of 1893 of 450,133 hectolitres, though when compared with the inflated export of 1892 there seems to be a deficiency against 1893 of 1,372,702 hectolitres. Wines.

Taking the province of Malaga in particular the effect of the long summer was favourable, the grapes ripened early and the gathering was performed under favourable circumstances. The wine obtained was of good quality and the yield was larger than last year.

The total export of wine during the last 3 years has been, according to the custom-house returns—

Year.	Quantity.
	Litres.
In 1891	10,792,875
1892	23,720,978
1893	6,371,269

so that putting aside the extraordinary export just before the expiration of the French treaty, Malaga has lost heavily in 1893, but I am credibly informed that there are very fair signs of improvement.

Viticulture.

In my agricultural report I have given particulars of how much might be done towards the improvement of viticulture in this part of Spain with great advantage to many of my young fellow countrymen, for the present I will simply state that the vineyards round Malaga are slowly recovering from the ravages of the phylloxera, and every year fresh plantations are being made.

Grapes.

More grapes have been exported from Almeria lately than from any other part of this consular district, thanks to the phylloxera, but it is hoped that ere long even this will be remedied, as there is no doubt of the superiority of the grape grown in the Malaga district proper.

The best grape for export comes from the Loja vine, and the best produced are those in the districts of Coin and Alhaurin, both within easy reach of the town of Malaga, but even these districts have lately suffered from the phylloxera as is shown by the last yield of about 30,000 barrels, as against that of 60,000 barrels of 3 years ago. Judging from the present appearance of the vines, the next crop is estimated by competent authorities to yield only about 20,000 barrels, the shipments made during the past season averaged about one dollar (say 3*s.* 4*d.* per barrel f.o.b.).

The prices of the Loja grape in the vineyard have varied from 20 reals to 32 reals (say 2*d.* to a real) per 11½ kilos., and muscatel grapes from 10 reals to 22 reals for the same quantity.

Raisins.

This season's raisin report differs little from that of last year, the crop consisted of about 400,000 boxes of very good quality. It is to be regretted that the difference in prices admits of the Denia fruit being imported here and re-shipped as Malaga produce. Denia muscatels, though what is called a fine bold fruit, do not ever, as to quality, come anywhere near the genuine Malaga raisin, and it is found that the renown which Malaga has always enjoyed throughout the world is likely to be seriously affected if the present system goes on unchecked. Prices averaged 4*s.* to 16*s.* 6*d.* per box according to class.

Olives and olive oil.

A much greater quantity of oil was exported last year, the amount sent away from this port being:—

Year.	Quantity.
	Kilos.
In 1891	1,471,037
1892	3,505,932
1893	10,593,857

This consular district includes the second largest olive-growing tracts in Spain as may be seen from the following table (Annex D). The various divisions coming in the following order:—

District.	Area.
	Hectares.
Jaen..	193,143
Malaga	42,478
Murcia	26,443
Granada	12,847
Almeria	1,995

the Jaen district alone beating that of Cordova by 2,298 hectares, and that of Seville by 23,880 hectares.

The prices of wheat of the harvest of 1893 have varied from 48 reals to 58 reals per fanega of 44 kilos. for grain grown in the province, 50 reals to 56 reals for white Castillian wheat (delivered at Malaga station). Wheat.

Foreign wheat has obtained 50 to 60 reals for the same quantity. The principal arrivals of wheat from abroad have been from Bombay, America, Russia, and Morocco, selling at the following prices:—

	Per 100 Kilos.	
	From—	To—
	Pesetas.	Pesetas.
Indian	18	21
Morocco	18	21
American	$14\frac{3}{4}$	21
Russian	$14\frac{1}{2}$	16

Small quantities have also been received from Marseilles and Liverpool.

The amount imported in 1892 was 9,107,936 kilos. and in 1893 was 16,813,141 kilos. (See annex B.)

The harvest of 1893 was a small one, while there are good hopes for 1894, though nothing can be prophesied with certainty as the plant is a delicate one. Prices have fluctuated from 70 reals to 90 reals per fanega of 57 kilos. Chick peas are exported from here to Havanna and Porto Rico, and imported from Morocco, the latter obtaining, according to quality, from 55 reals to 90 reals per fanega of $57\frac{1}{2}$ kilos., those grown in the province 36 reals to 48 reals per fanega of $53\frac{1}{2}$ kilos., while Roumanians got 35 to 43 reals. Chick peas.

The crop has been good and the quality superior to that brought from Morocco, Roumania, and Marseilles (Russian). Indian corn

A good deal has been imported from Morocco at 20 reals to 26 reals per fanega of 33 kilos., while native barley has produced 20 reals to 28 reals. Barley.

There has been an increase in the consumption of Labrador fish compared with previous seasons, but no demand whatever for Codfish.

British shore which has been entirely substituted by Norway fish. The import for 1892–93 was 47,733 cwts. and in 1891–92 55,128 cwts., and in 1893–94 have already come to 49,146 cwts.

The Norway fish imported came to:—

Year.	Quantity.
	Cwts.
In 1891–92..	5,400
1892–93..	8,670
1893–94..	7,800

Silk culture.

It has been a matter of surprise to many that Malaga, whose climate and soil are so peculiarly adapted to it, should have so entirely allowed this profitable branch of trade to fall into oblivion. Up to 50 years ago, as I am informed, a very extensive and profitable business was carried on here in the various branches of sericulture and manufacture of silken stuffs, but then the Lyons weavers took to adulterating or mixing cotton and wool with their silk and thus producing a cheaper material, and underselling those of the Spanish manufacturer, who in course of time was driven entirely out of the market, and even mulberry trees have now become comparatively rare in the province.

Onions

Another instance of neglected cultivation here is the large sweet white onion which is so largely sent to England.

Pomegranates. Jordan almonds.

Turned out a crop of about 20,000 cases of about 5*s.* each f.o.b.

Of these there was a large crop, and the kernels were in fair proportion as regards classes, the f.o.b. prices range from 30*s.* to 60*s.* per box of 25 lbs. net.

Malaga as a health resort.

Though very slowly, the inhabitants are waking up to the fact that Malaga should be one of the finest health resorts in the world. Its climate is one of the very best and the situation excellent, while with the increased facilities to and from Gibraltar the place is now becoming a very accessible one, and if a little more foreign energy could be imported many a better known place would find itself left behind in the bid for popularity. Under the auspices of the last and present mayors the town has improved wonderfully, and the system of drainage radically altered.

We have an English and a Swedish doctor, as well as several good Spanish ones, an English chaplain, a boating club and a lawn tennis club, while the greatly improved harbour makes it a pleasant place for yachts.

Census statistics.

Though not strictly a commercial or trade matter, nor limited to the province of Malaga, I append some curious statistics as to the state of education in Spain, copied from a daily paper.

The Census of Spain.

Out of nearly 18,000,000 inhabitants which Spain possesses one half have declared that they have neither profession nor occupation, as follows:—

	Number.
Females	6,764,406
Males	1,963,113
Total	8,727,519

PROFESSION OR OCCUPATION.

	Number.
Agricultural labourers —	
Men	4,033,391
Women	828,531
Clerks employed in public offices	97,257
Government pensioners	64,000
Schoolmasters and professors	24,642
Schoolmistresses and female professors	14,490
Students —	
Males	1,003,310
Females	713,110
Medical practitioners—	
Males	20,477
Females	78
Actors and actresses	3,497
Press —	
Males	1,171
Females	74
Domestic servants —	
Women	319,596
Men	89,058
Professional beggars—	
Men	39,279
Women	51,346
Priests and friars, &c.	43,588
Nuns	319,285

SPANIARDS WHO CAN READ AND WRITE.

	Number.
Men	3,417,855
Women	2,686,615
Total	6,104,470

It may be noticed that no mention is made in the above list of soldiers or sailors, the fishing population, or of several other occupations, and there is no reason to believe them to be more or less educated than their neighbours.

Annex A.—Return of British Shipping at the Port of Malaga in the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.								Cleared.							
Total Number of Vessels.			Total Tonnage.			Total Number of Crews.	Total Value of Cargoes.	Total Number of Vessels.			Total Tonnage.			Total Number of Crews.	Total Value of Cargoes.
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.			With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		
							£								£
87	11	98	65,911	3,696	69,607	2,020	...	46	10	56	31,317	738	32,055	937	...

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.								Cleared.							
Countries whence Arrived.	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.	Countries to which Departed.	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.
	With Cargoes.	In Ballast	Total.	With Cargoes.	In Ballast.	Total.				With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		
								£									£
France	...	2	2	...	1,234	1,234	32	...	France	2	3	5	1,342	2,064	3,406	96	...
Germany	1	...	1	473	...	473	24	...	Belgium	3	...	3	1,419	...	1,419	68	...
Belgium	2	...	2	1,523	...	1,523	44	...	Africa	...	1	1	...	98	98	26	...
Greece	1	...	1	858	...	858	19	...	Italy	...	4	4	...	1,[illegible]	1,[illegible]	[illegible]	...
Africa	2	...	2	146	...	146	12	...	Spain	92	24	116	84,436	15,521	99,957	2,526	...
Italy	3	2	5	3,[illegible]	987	4,[illegible]	110	...	United States ...	2	...	2	3,972	...	3,972	79	...
Spain	62	14	76	57,[illegible]	8,[illegible]	65,[illegible]	1,[illegible]	...	Portugal	1	1	2	473	98	571	26	...
Russia	1	...	1	1,[illegible]	...	1,[illegible]	20	...	South America ...	1	...	1	149	...	149	5	...
Portugal	3	...	3	1,[illegible]	...	1,[illegible]	62	...									
Turkey	1	...	1	1,[illegible]	...	1,[illegible]	32	...									
Indirect ...	76	13	94	[illegible]	[illegible]	[illegible]	1,980	...	Indirect ...	101	33	134	91,791	22,863	114,654	[illegible]	
Direct ...	87	11	98	65,911	3,696	69,607	2,020	...	Direct ...	46	10	56	31,317	738	32,055	937	...
Total	163	29	192	[illegible]	14,410	147,182	4,000	...	Total... ...	147	43	190	123,108	23,601	146,709	3,931	...
...	...	...	...	...	...	...	...	...	In port ...	2	...	2	473	...	473	19	...
...	...	...	...	...	...	...	...	...	Grand total ...	149	43	192	123,581	23,601	147,182	4,000	

Annex B.—RETURN showing the Principal Articles of Import into the Port of Malaga for the Year 1893, with the Country of Origin and Comparative Totals for 1892–93.

Articles.		England.	France.	Germany.	Belgium.	Sweden.	Norway.	Holland.	Cuba.	United States.	Denmark.	Philippine Islands.	Porto Rico.	Italy.
Oils, paints, colours, &c.	Kilos. ...	200,804	209,696	12,475	67,573	...	...	...	...	..	...	...	...	...
Alcohol	Litres ...	...	...	39	...	...	...	...	...	...	...	...	...	...
Cotton, raw	Kilos. ...	7,019	...	143	...	...	...	...	...	1,579,798	...	...	...	...
,, spun	,, ...	200	3,277	241	2	...	...	...	...	...	...	...	...	...
Starch	,, ...	3,185	2,410	89,020	233,122	...	...	...	...	...	...	...	...	...
Tar, pitch, and asphalt ...	,, ...	...	6,666	...	...	...	...	...	...	...	...	...	...	...
Sugar	,, ...	44	...	657	...	...	...	...	...	...	...	...	6,548	...
Sulphur and chemicals ...	,, ...	1,234,819	183,355	289,749	242,241	...	...	24	...	...	...	...	...	3,119
Codfish	,, ...	18,185	...	2,696	...	...	459,867	...	...	...	...	...	...	...
Flags, tiles, bricks, cement, &c., for buildings	,, ...	113,544	4,804,883	27,937	17,854	...	...	...	...	...	39,084	...	...	1,757
Cocoa	,, ...	3,757	162	19	...	...	...	...	29,977	...	...	...	3,899	...
Coffee	,, ...	1,218	...	...	...	...	...	...	23,775	...	...	...	312,150	...
Coal...	,, ...	39,064,878	199,190	...	...	...	...	...	...	...	...	...	...	...
Charcoal	,, ...	1	4	...	...	...	...	...	...	...	...	...	...	270,000
Barley, maize, and other cereals, except wheat...	,, ...	502,245	518,293	7,201	...	...	...	...	...	...	...	...	...	...
Beer, cider, and sparkling wines	Litres ...	10,871	1,493	77,122	2,482	...	...	...	...	...	...	...	...	...
Leather, skins, hides, &c.	Kilos. ...	28,473	22,068	8,343	250	...	...	...	...	...	...	...	...	...
Staves	Pieces ...	7,164	6,159	...	...	...	...	...	...	247,664	...	...	...	...
Spices, preserves, &c. ...	Kilos. ...	29,618	2,415	86	...	...	...	...	...	...	...	...	...	319
Tin, copper, brass, and zinc, in bars or wrought	,, ...	26,087	32,064	11,796	28,983	...	...	330	...	...	...	...	...	32
Grease	,, ...	10,803	17,903	21,007	438	...	...	...	...	...	...	...	...	...
Guano	,, ...	1,525,060	1,216,962	105,696	140,550	...	...	...	...	...	...	...	...	...
Iron, cast and wrought...	,, ...	574,218	131,338	146,417	574,026	...	...	1,040	...	...	...	...	...	401
,, wire...	,, ...	134,591	56,026	6,278	127,636	...	...	...	...	...	1,060	...	...	...
Lard and bacon	,, ...	111,228	...	...	...	...	...	...	...	...	...	...	...	...
Butter	,, ...	1,279	4	21,381	1,824	...	...	...	...	...	5,795	...	...	...
Machinery...	,, ...	247,603	86,151	29,336	196,330	...	...	...	...	...	...	...	...	1,157
Furniture, manufactures of, and prepared wood	,, ...	9,550	26,063	34,091	3,986	455,687	...	171	...	...	48,372	...	...	41
Paper of all kinds ...	,, ...	16,903	26,971	106,236	149,845	15,300	...	...	...	...	15,000	...	...	217
Petroleum	,, ...	41,003	18,938	450	411	...	...	...	...	402,540	...	...	...	...
Cheese	,, ...	14,973	6,735	568	12,062	...	...	7,694	...	...	...	...	...	...
Deals, planks, &c. ...	Cub. met.	34	5,421	...	...	..	...	...	...	...	...	...	...	...
Woven goods of all kinds	Kilos. ...	38,144	28,396	11,743	405	...	...	...	...	...	...	...	...	...
Wheat	,, ...	11,340,907	1,810,907	...	...	...	...	...	...	1,683,095	...	...	...	...
Glass and porcelain, &c...	,, ...	32,706	72,929	72,864	32,245	...	...	2,064	...	...	...	...	...	109

RETURN showing the Principal Articles of Import into the Port of Malaga for the Year 1893, with the Country of Origin and Comparative Totals for 1892-93—continued.

Articles.		Newfoundland.	Labrador.	Morocco.	Algeria.	Africa.	Ecuador.	Austria.	Portugal.	Other Countries.	Turkey.	Russia.	Totals, 1893.	Totals, 1892.
Oils, paints, colours, &c.	Kilos.	...	...	...	...	...	...	...	...	...	...	...	490,548	744,622
Ammunition	Litres	...	...	...	...	...	...	...	...	...	...	...	30	693,970
Cotton, raw	Kilos.	...	...	...	...	...	...	...	...	...	...	...	1,586,900	2,6[illegible]7
,, spun	,,	...	...	...	...	...	...	...	...	...	...	...	[illegible]	14,827
Starch	,,	...	...	...	...	...	...	...	...	...	...	...	327,787	378,226
Tar, pitch, and asphalt	,,	...	...	...	...	...	...	...	...	...	...	...	6,[illegible]	14,[illegible]
Sugar	,,	...	...	...	14	...	...	...	...	10	...	...	7,[illegible]74	1,[illegible]205
Sulphur and chemicals	,,	...	...	...	...	...	...	...	...	...	...	...	1,966,[illegible]67	3,[illegible]225
Cotton	,,	...	2,452,539	295,944	...	...	...	...	...	...	...	...	3,220,221	3,364,090
Flags, tiles, bricks, cement, &c., for building	,,	...	...	...	2,200	...	...	...	...	300	...	...	5,007,619	8,801,038
Cloves	,,	...	...	...	...	...	...	20,473	...	...	...	...	68,287	78,448
Coffee	,,	...	...	...	...	...	...	...	...	...	...	...	337,143	347,513
Coal	,,	...	...	...	...	...	...	...	...	...	...	...	39,264,078	8,884,051
Cocoanut	,,	...	...	...	...	2,450	...	...	...	...	...	...	272,455	1,426,268
Beer, cider, and other alcoholic except wine	,,	...	...	1,023,057	...	...	...	...	...	...	...	...	2,051,396	2,435,694
Beer, cider, and sparkling wines	Litres	...	...	...	...	...	...	...	...	...	...	...	91,[illegible]	[illegible]23
Leather, skins, hides, &c.	Kilos.	...	...	110,733	2,545	...	...	...	...	6,343	...	...	178,[illegible]26	165,[illegible]3
Stones	Pieces	...	...	...	...	...	...	...	...	...	...	...	2[illegible]87	36[illegible]60
Spices, preserves, &c.	Kilos.	...	...	2	...	...	...	...	...	272	...	...	32,[illegible]12	811,[illegible]27
Tin, copper, brass, and other, in bar or wrought	,,	...	...	360	...	...	...	...	...	185	...	...	99,777	1[illegible],949
Grease	,,	...	...	...	...	...	...	...	...	...	...	...	80,151	148,251
Grains	,,	...	...	...	...	...	...	...	...	...	...	...	2,[illegible]28	3,[illegible]124
Iron, cast and wrought	,,	...	...	883	...	...	...	...	...	1,139	...	...	1,[illegible]42	[illegible]
,, wire	,,	...	...	...	...	...	...	...	...	604	...	...	326,[illegible]5	9,[illegible]793
Lard and bacon	,,	...	...	...	...	...	...	...	...	...	...	...	111,[illegible]28	108,[illegible]8
Leather	,,	...	...	...	...	...	...	...	...	...	...	...	[illegible]6	[illegible]5
Machinery	,,	...	...	...	...	...	...	...	...	...	...	...	560,577	1,632,127
Furniture, cabinet-ware and unpainted wood	,,	...	...	...	...	...	...	25	...	2,086	...	...	124,[illegible]42	427,[illegible]8
Paper of all kinds	,,	...	...	...	...	...	...	...	...	...	...	...	3[illegible],472	615,[illegible]62
Provisions	,,	...	...	...	...	...	...	...	...	...	...	...	4[illegible]5,[illegible]42	1,411,[illegible]6
Cheese	,,	...	...	...	...	...	...	...	...	...	...	...	4[illegible]8	[illegible]
Linen, pumice, &c.	Cub. met.	...	...	...	...	...	...	...	...	396	...	13,540	19,[illegible]91	[illegible]836
Wines, spirits of all kinds	Litres.	...	...	...	...	...	...	...	...	13	...	...	7[illegible]21	9[illegible]451
Wheat	,,	...	...	1,978,232	...	...	...	...	...	...	...	...	16,81[illegible]141	9,1[illegible]86
Glass and porcelain, &c.	,,	...	...	...	...	...	...	...	18	6,225	...	...	2[illegible]6,[illegible]96	2[illegible],[illegible]4

Annex C.—RETURN of the Principal Articles of Export from the Port of Malaga for the Year 1893, with Comparative Totals for 1891–92.

Articles.		January.	February.	March.	April.	May.	June.	July.	August.
Olive oil	Kilos.	709,316	1,642,371	2,212,769	1,798,793	1,080,480	658,375	884,939	431,527
Olives	,,	5,055	1,530	1,182	...	7,054	2,000	...	2,520
Spirits	Litres	2,078	1,420	8,008	3,581	3,569	7,875	6,625	11,341
Garlic	Kilos.	1,645	...	2,438	...	...	65,455	26,840	21,245
Almonds	,,	23,131	28,402	21,086	13,381	18,429	2,660	8,898	40,050
Canary seeds	,,	...	22	4,010	6,626	18,951	7,253	5,330	3,018
Aniseed	,,	2,048	11,500	567	...	...	4,940	...	1,651
Rice	,,	...	195	200	198	995	...	1,188	594
Hazel nuts	,,	190	...	...	...	...	...	...	...
Saffron	,,	7	...	7	...	15	12	...	...
Cocoa shell	,,	920	...	...	2,668	414	2,760	...	...
Orange peel and vegetable produce	,,	14,170	33,262	22,650	33,515	2,670	360	2,062	20,560
Chesnuts and walnuts	,,	...	...	...	...	...	...	...	...
Onions	,,	...	...	...	...	...	...	...	1,586
Cummin seed	,,	...	...	659	1,570	915	...	1,555	...
Preserves	,,	2,560	1,209	441	2,100	3,293	15	...	30
Chocolate	,,	380	1,197	118	471	...	112	651	646
Esparto grass	,,	...	200,900	...	300,000	251,300	...	...	...
Dried fruits	,,	3,750	5,050	1,260	4,763	...	3,232	...	...
Green fruits	,,	1,440	...	...	...	...	2,220	690	...
Chick peas	,,	163,145	182,053	110,398	216,909	86,431	264,770	68,373	36,774
Pomegranates	Pieces	...	...	...	...	...	...	...	131,744
Figs	Kilos.	2,478	620	2,000	46	...	...	...	...
Hard soap	,,	140	138	5,730	...	2,200	1,495	5,600	...
Lemons	,,	11,474	30,300	...	...	...	...	...	...
Minerals	,,	4,900	...	35,624	36,135	20,263	...	711	...
Oranges	,,	42,450	40,220	11,250	12,000	14,000	...	...	3,648
Manufactured palm leaf	,,	13,476	15,742	3 518	22,350	24,840	7,302	10,700	9,996
Raisins	,,	224,264	197,861	102,968	86,309	59,078	73,653	40,064	51,442
Pimento	,,	5,625	4,892	4,962	3,074	5,200	...	1,910	423
Lead	,,	7,600,102	2,986,430	2,954,429	5,297,053	2,681,425	4,332,884	3,338,651	4,376,265
Liquorice root	,,	5,760	...	46,077	47,234	80,129	158,512	...	...
Grapes	,,	150	...	2,562	...	...	...	...	9,691
Wines	Litres	336,593	395,677	594,708	641,888	628,890	635,528	280,939	503,163

RETURN of the Principal Articles of Export from the Port of Malaga for the Year 1893, with Comparative Totals for 1891–92—continued.

Articles.		September.	October.	November.	December.	Totals.		
						1893.	1892.	1891.
Olive oil	Kilos.	505,703	252,288	145,213	25,183	10,572,857	3,105,932	1,471,037
Olives	"	450	763	746	5,120	26,420	42,488	38,420
Spirits	Litres	19,288	9,020	3,569	11,767	82,961	72,664	69,742
Garlic	Kilos.	87,840	5,820	24,360	27,820	265,468	162,638	38,240
Almonds	"	157,770	186,549	143,420	31,467	676,293	557,980	782,784
Cassey seeds	"	16,076	4,750	2,475	7,128	75,639	181,730	130,696
Aniseed	"	5,979	5,642	3,486	2,630	38,443	130,942	194,251
Rice	"	1,579	7,952	792	69,358	83,951	4,364	38,941
Hazel-nuts	"	112	1,000	800	196	2,298	5,580	1,183
Saffron	"	...	35	1	...	77	86	57
Cocoa shell	"	1,610	2,300	...	...	10,672	15,832	32,891
Orange peel and vegetable produce	"	2,530	170	...	10,840	142,789	79,882	152,475
Chesnute and walnuts	"	...	...	2,360	8,167	10,527	1,314	5,580
Onions	"	6,880	...	...	...	8,466	1,481	4,516
Cummin seed	"	6,134	4,120	1,300	...	16,253	25,672	26,476
Preserves	"	278	150	802	7,466	16,344	16,495	11,025
Chocolate	"	712	327	655	1,004	6,253	7,006	5,579
Esparto grass	"	...	...	...	...	751,300	1,106,330	1,193,960
Dried fruits	"	3,440	...	4,800	1,280	27,575	40,899	48,851
Green fruits	"	5,473	558	...	...	10,381	5,447	7,979
Cheese	"	177,544	56,864	45,654	297,758	1,708,674	2,385,671	1,531,963
Pomegranates	Pieces	151,135	61,600	824	1,387	345,130	139,293	339,740
Figs	Kilos.	63,675	77,886	14,497	17,042	173,244	981,824	249,145
Hard soap	"	4,940	1,150	...	1,620	28,913	30,885	15,981
Lemons	"	663,444	914,133	219,616	94,689	1,933,756	1,373,129	2,782,589
Minerals	"	44,900	...	69,734	56,489	267,726	247,660	319,360
Oranges	"	...	96,956	303,425	251,340	784,489	1,762,162	957,488
Manufactured palm leaf	"	8,310	9,513	12,932	25,116	183,935	122,630	91,617
Raisins	"	780,095	1,284,984	454,396	383,895	3,008,720	5,437,165	5,736,644
Potatoes	"	...	1,500	13,322	127,037	168,745	55,866	49,346
Lead	"	4,107,784	2,303,054	3,659,807	1,956,825	44,654,170	26,636,149	31,631,223
Liquorice root	"	...	900	5,050	...	34,000	405,689	444,362
Oranges	"	...	94,702	36,663	84,309	269,084	460,961	414,414
Wine	Litres	380,487	577,422	411,639	834,434	6,371,209	23,720,978	10,792,575

Annex D.—PRODUCTION, Cost, and Value of Olive Oil in Spain.

Provinces.	The Oil per Hectare.	Total Production.	Price of the Hectolitre.	Value of the Production.
	Hectolitres.	Hectolitres.	Pesetas.	Pesetas.
Alava..	1·80	1,292	66	85,272
Albacete	1·99	31,527	65	2,453,097
Alicant	1·94	36,968	68	2,591,677
Almeria	2·29	5,318	67	357,814
Avila..	2·60	5,235	77	326,428
Badajoz	2·65	89,185	66	5,815,602
Baleares	1·18	41,005	73	3,070,265
Barcelona	1·94	7,776	76	562,488
Caceres	1·77	52,650	63	3,175,681
Cadiz..	2·18	29,263	63	1,170,000
Castellon de la Plana	1·51	37,019	69	2,621,610
Ciudad Real	2·57	76,994	66	5,017,472
Cordoba	3·26	586,696	67	36,973,232
Cuenca	1·43	10,932	68	742,625
Gerona	1·94	41,527	67	2,766,379
Granada	2·48	33,374	63	2,152,376
Guadalajara	1·50	29,151	67	1,976,866
Huelva	2·43	46,741	63	3,014,700
Huesca	1·65	27,699	74	2,062,849
Jaen	2·84	583,737	61	37,912,067
Lerida	2·65	160,286	69	10,458,395
Logroño	1·67	10,238	70	736,632
Madrid	1·13	13,600	74	1,027,288
Malaga	1·80	68,893	66	4,624,244
Murcia	2·96	86,398	66	5,629,454
Navarra	2·64	23,199	79	1,831,347
Salamanca	2·18	5,162	65	349,820
Seville	2·66	433,169	64	27,692,741
Tarragona	2·51	157,403	73	10,959,617
Teruel	2·90	40,321	63	2,540,223
Toledo	2·33	75,988	68	2,201,999
Valencia	2·16	75,350	60	5,261,397
Zaragoza	3·34	52,288	68	3,658,360
Total*	..	2,976,384	..	195,423,017

* 33 provinces produce olive oil; 16 provinces do not produce olive oil, climate and nature of soil being unfavourable ; total number of provinces in Spain, 49.

TABLE showing the Cultivation of the Olive Tree in Spain.

Provinces.	Dry Land.		Irrigated.		Total.	
	Hectares	ares.	Hectares	ares.	Hectares	ares.
Alava	718	0	...		718	0
Albacete	11,128	0	8,276	0	19,404	0
Alicante	19,785	0	...		19,785	0
Almeria	1,505	86	449	88	1,955	74
Avila	2,008	0	...		2,008	0
Badajos	34,765	0	...		34,767	0
Baleares	26,838	26	...		26,838	26
Barcelona	4,890	0	...		4,890	0
Caceres	25,412	0	...		25,412	0
Cadiz	12,577	0	...		12,577	0
Castellon de la Plana	23,815	0	185	0	24,000	0
Ciudad-Real...	30,216	0	...		30,216	0
Cordova	191,045	9	...		191,045	9
Cuenca	9,082	0	...		9,082	0
Gerona	20,853	0	...		20,853	0
Granada	5,874	43	6,972	61	12,847	4
Guadalajara	17,672	0	...		17,672	0
Huelva	19 675	0	...		19,675	0
Huesca	13,938	0	1,276	0	15,214	0
Jaen	173,019	34	20,124	56	193,143	90
Lerida...	49,757	0	6,900	0	56,657	0
Logroño	2,880	0	3,323	0	6,203	0
Madrid	10,860	0	80	0	10,940	0
Malaga	41,069	0	1,409	0	42,478	0
Murcia	22,662	0	3,781	0	26,443	0
Navarra	3,961	0	5,154	0	9,115	0
Salamanca	2,653	0	...		2,653	0
Seville...	169,263	0			169,263	0
Tarragona	57,330	0	97	0	57,427	0
Teruel...	11,421	0	2,114	0	13,535	0
Toledo	31,242	0	..		31,242	0
Valencia	31,134	0	669	0	31,803	0
Zaragoza	4,126	0	10,831	0	14,957	0
Total	1,082,176	98	71,642	5	1,153,819	3

* 33 provinces with olive cultivation; 16 provinces with no olive cultivation, the climate and the nature of the soil being unfavourable; total number of provinces in Spain, 49.

NOTE.—The foregoing two tabular statements have been prepared by the Provincial Agronomical Engineers of Spain.

ADRA.

Mr. Consular-Agent Benet reports as follows:—

Mining industry. There has been a very heavy fall in the price of lead, and had it not been for the high rate of exchange on England the factories could hardly have continued working.

Lead. The export of lead was less than in any previous year, and as

Coal import. a consequence the import of coal has suffered so that only four English ships with 2,700 net register tonnage, while more foreign ships have been to Adra than in former years.

Grapes. The crop was a good one, but the prices obtained did not come up to the expectations of the producers or the quality of the fruit, as it was discharged in bad condition owing to the wrong kind of ship being used for transporting it in good form.

Vines. Farmers still plant the riparia and other American vines as the phylloxera has attacked the old native stocks.

Factories. New cotton mills have been erected by Messrs. Villaloba and Company, of Nerja, in the Fuentes de Matilde with iron looms worked by steam instead of the ancient wooden ones.

Our imports have been:—

Articles.	Quantity.
	Kilos.
Cotton	132,160
Yarn, cotton, wool, and hemp	28,379
Manure (artificial)..	25,379
Coal..	1,936,214
Coke	326,373

And our exports:—

Articles.	Quantity.
	Kilos.
Lead ore (silver)	344,486
„ in bars	2,757,638

AGUILAS.

Mr. Vice-Consul Naftel reports as follows:—

Shipping. The following foreign vessels (steamers) entered and cleared during the year:—

Nationality.	Number of Vessels.	Tons.
British	70	59,617
Russian	2	1,464
French	2	1,028
Norwegian	1	488
Total	75	62,597

EXPORTS.

Articles.		Quantity.	For—
Esparto	Tons ..	22,900	Great Britain
Oranges	Cases ..	350	Great Britain
Barley	Tons ..	202	Great Britain
Machinery (used)	„ ..	180	Tripoli
Grapes	Barrels and Boxes ..	13,279	Great Britain
Iron ore	Tons ..	29,650	Great Britain
„	„ ..	11,950	France
„	„ ..	3,000	United States
Total	..	44,600	

IMPORTS.

Articles.		Quantity	From—
Coal	Tons ..	2,681	Wales
Cement	„ ..	115	France
Railway material	„ ..	457	Belgium

Imports by rail.

During the year the following goods were received at this railway station, showing an increase on last year of 17,056 tons which augurs well for this company's receipts:—

Articles.	Quantity.
	Tons.
Iron ore	69,740
Esparto grass	12,506
Sundries	9,760
Flour	1,642
Cereals	1,404
Timber	1,194
Fruits	1,174
Liquids	643
Straw	503
Total	98,566

Lead smelting.

A small foundry has been set up as a trial with ore from the neighbouring sierras, and the silver lead produced is sent to Cartagena by coasting craft.

Railways.

The Great Southern of Spain Company, Limited, continue to push on their line towards Granada, but as there are so many difficulties to contend with the time for its total construction is doubtful.

British subjects.

On December 31, 1893, this Vice-Consular register showed 64 residents of both sexes.

ALMERIA.

Mr. Vice-Consul Lindsay reports as follows:—

Shipping, falling-off.

There has again been a falling-off in British shipping here as compared with 1892. This is not owing to failure of crops but to the increased competition of foreign vessels, a competition which threatens to deprive British vessels of their hitherto almost exclusive enjoyment of the carrying trade from this port. The vintage of 1893 was normal, and it found its exit from this port in 120 vessels made up as follows:—

Nationality.	Number of Vessels.
British	71
Swedish and Norwegian	31
Spanish	13
German	3
Austrian	1
Danish	1
Total	120

Now in 1892 the vintage amounted to 476,540 barrels of grapes, and in that year 133 British vessels visited this port, whereas in 1893 with an export of 938,405 barrels, only 119 entered this port, that is to say, that with double the amount of merchandise exported there was a falling-off of 14 British vessels. Now, by an inspection of Annex C it will be found that in 1892, 50 foreign vessels (not including Spanish) cleared from this port, whereas in 1893 we have (not including Spanish) 67. For further elucidation and comparison I have added a column in this Annex for fruit carriers only in 1893. From the foregoing considerations it will at once be apparent that for some reason or other British vessels no longer enjoy the reputation so long maintained in this port of being almost exclusively the fruit-carriers. Why is this? It is not because they are not perfectly well adapted for such purpose, as every year sees more care taken with this very essential feature, and in very few instances, if any, have lower freights been accepted by their competitors. I think the solution is to be found in the fact that as a rule the competing vessels are smaller, and also that they come here with space sufficient only for a comparatively small number of barrels. The consequence is they get filled up sooner, whereas the larger British vessels have often to lie here day after day, much to the prejudice of their owner's interests and to the possible detriment of the fruit. In corroboration of this I have drawn up the table Annex D which gives some statistics of the various fruit carrying vessels, and from which the British owner can see that he gets more work out of his sailors than his competitors, *i.e.*, that in the question of crews the British sailor represents more net tonnage than any other. Strictly speaking the one Austrian and one Danish vessel should not be taken into account as not offering a fair comparison.

The largest vessel which loaded at the quay was the Anchor Liner "Nubia," of 2,319 tons net register.

Freights for grapes have been as follows during 1893 :— Freights, fruit.

To—	Per 25 Barrels.	
	From—	To—
	£ s.	£ s.
London and Hull	1 0	1 10
Liverpool	0 15	1 5
Bristol	..	1 10
Glasgow	1 0	1 10
New York	1 15	2 15

Other freights.

The most important were—

Articles.	Per Ton.	
	From—	To—
	£ s.	£ s.
Esparto	0 14	1 0
Iron ore	..	0 9

Imports and exports.

The imports are chiefly taken from the annual memoir of the Harbour Board of Works. The value has been assigned by myself, and in some cases was derived from the table given in Annex E, "Almeria market." The exchange has generally been calculated at 30 pesetas 50 c. per 1*l*. The exports have come more immediately under my personal notice, and may be taken as fairly correct.

IMPORTS.

Articles.	Quantity.	Value.
	Tons.	£
Sugar	513	15,390
Rice..	1,731	25,965
Iron wire	256	3,580
Salt fish	463	6,945
Coal..	9,806	13,238
Charcoal	1,994	6,979
Cement	1,968	2,952
Hydraulic lime	314	408
Pipe staves..	2,896	13,495
Barrel hoops	429	5,569
Flour	8,837	114,881
Wrought iron	1,300	11,050
Garbanzos	137	2,329
Haricot beans	121	1,210
Soap	1,098	24,156
Pine timber	3,008	12,234
Petroleum	504	15,876
Cork and cork dust	1,115	5,580
Tobacco	597	293,966
Wine	1,168	10,512
Locomotives	285	12,600

EXPORTS.

Articles.		Quantity.	Value.
			£
Calamine	Tons ..	1,035	2,036
Lead ore	„ ..	740	2,500
Iron ore	„ ..	15,050	3,947
Manganese ore	„ ..	227	227
Esparto	„ ..	15,341	69,034
Oranges	Cases ..	10,006	2,668
Almonds	„ ..	16,388	19,119
Grapes	Barrels ..	938,405	469,202

Crops. These have been fairly good during 1893, and the prospects for the present year are excellent.

Vintage. There is some mistaken idea that the muscatel grape is grown in this district. This, however, is not the case, as the great bulk of the grapes shipped from this port, and which are known par excellence as "Almeria" grapes, are the thick-skinned shipping variety known as "Casta de Ohanes," or "Bacci," a variety dedicated to Andrés Baccio. This variety is described by the erudite Dr. Simon de Roxas Clemente* as follows:—"Foliis lutescentibus : Acinis confertissimis mediocribus subcylindricis subaureis duris subacidis." The fruit is 6 lines or a little more in length, and 4 lines in thickness, generally very unequal, very fleshy, and very late of ripening. This esteemed variety was taken to Ohanes from the neighbouring village of Ragol, where it is cultivated in a delightful spot called La Daira. In Ohanes it has greatly improved, both in flavour and durability. It has been left on the vines till Christmas, and then has stood the journey to Madrid and Cadiz without suffering any material deterioration. Hung up, the bunches may be kept for a year.

Originally cultivated only in Ragol and Ohanes it has now spread to all the towns and villages in the valley of the Andarax, down even to the town of Almeria itself. In fact, the road from Ohanes to the capital is one immense green mantle interrupted in its latter course by occasional unreclaimed fields of cactus bearing the prickly pear,† which forms a staple article of food for the poor in the early autumn, or by odd-looking hills of most singular formation, and greatly resembling mud-heaps.‡

This grape, from the absence of any decidedly pronounced flavour, and on account of its not being too sweet, is extremely refreshing, and, owing to its great durability when carefully handled, it commands a ready market in Great Britain and the United States. In the latter country, particularly fine fruit has

* Ensayo sobre las variedades de la vid comun que vegetan en Andalucia, por Don Simon de Roxas Clemente y Rubio, &c. 8vo. Madrid, 1807.

† "Opuntia vulgaris."

‡ Unfortunately the deadly phylloxera has invaded these regions, and notwithstanding the enormous number of new plantations east and west it still circumscribes the production.

fetched from 15 dol. to 20 dol. per barrel. The fruit is packed chiefly in oak barrels carefully filled up with granulated cork, which is chiefly brought from Catalonia and the vicinity of Gibraltar.

Last season was somewhat better than normal, although the unseasonable heats checked the development of the fruit to a certain extent. Notwithstanding, 938,405 barrels (of 55 lbs. each) were sent to the following ports:—

Ports.	Quantity.
	Barrels.
New York	236,916
Boston	25,563
Philadelphia	11,494
Baltimore	1,056
Germany, Russia, Denmark, Sweden, and Norway	10,000
United Kingdom	653,376
Total	938,405

New market.

The new market and surrounding edifices are now open to the public. The market is a handsome, spacious, and efficient building. The lateral street, however, which is to connect the market with the Boulevard del Principe, still exists merely on paper, owing to certain "caziques" whose selfishness and want of public spirit have thrown every obstacle in the way of the opening of this absolutely necessary thoroughfare.

Harbour works.

These continue steadily. The eastern breakwater extends now (May 19) to 410 metres (1,345 feet), with a depth of 11·30 metres (37 feet, or 6⅛ fathoms), whilst the western mole has a total length of 1,520 metres (4,987 feet, or 293 feet less than a mile), with a depth of 15 metres (49 feet, or 8⅛ fathoms). The new part of this mole is 880 metres (2,887 feet long).

Linares-Almeria Railway.

This also progresses although somewhat slowly owing to the dilatoriness of the Government in paying the subvention. It is now, however, confidently affirmed that 18,000,000 pesetas are to be voted by Parliament to meet this subvention. During the past year the constructors have imported the following material for this railway, viz., 73,736 pine sleepers, weighing 5,080 tons; 1,094 tons rails and accessories; 1,564 tons bridge iron; 140 tons material for shops and stations; 436 tons wagons and wheels; 299 tons iron for the station edifice; 165 tons 3 locomotives and their tenders; 13,168 tons cement and hydraulic lime. It is affirmed that the line will be opened for traffic as far as Guadix by the end of the year.

Exchange.

Exchange has fluctuated during the year between 29·25 pesetas and 30·90 pesetas per 1*l.* for bills at 8 days' sight.

Incandescent lights.

The new incandescent lamps, "Auer," have been pretty generally introduced into shops and cafés, and have seriously crippled the electric light owing to the low consumption of gas,

which at present costs 30 c. of a peseta per cubic metre, or 5*s.* 7*d.* per 1,000 cubic feet at the exchange of 30 pesetas 50 c. per 1*l.*

Embankment of water-ways.

In sight of the disastrous effects to life and property of the periodically-recurring floods, it was determined after the last terrible visitation (September 11, 1891) to provide proper and sufficient channels to carry off any abnormal rainfall by straightening and fortifying the natural waterways, or "ramblas." Great rejoicing has been caused in the neighbourhood through the publication of an edict authorising the adjudication by auction of the various works connected with this undertaking.

Almeria as a health resort.

The winds and consequent dust are the great drawback to the climate. But to make up for this occasional discomfort what glorious balmy days of cloudless beauty are enjoyed on these Mediterranean shores. Almeria is in the same parallel of latitude as Algiers and the south of Sicily, and winter is practically unknown. Indeed, the finest months of the year are December and January. For the delicate invalid requiring every comfort there is, alas, no well-appointed hotel, in fact a decent hotel is a "rara avis" throughout the entire peninsula. Still the Grand Hotel, Tortosa, as far as the rooms only are concerned is a tolerably fair caravansary, which will at least compare favourably with its congeners along the coast. The town is sheltered from the north by a low range of hills which effectually act as a barrier to the icy blasts from the Sierra Nevada, and the gorgeous effects of light on these hills and neighbouring sierras at sunrise and sunset will go far to compensate the artist for any shortcoming in the hotel cuisine. The great reproach of this city that she still possesses no means of railway communication might almost prove an attraction to some travellers where the awful solitude and silence of these everlasting hills is desecrated by no shrieking railway whistle. But this state of matters cannot last long. Hasten then, O ye travellers, to this unique railwayless spot before the resistless tide of modern civilisation shall have rendered it as unromantic and commonplace as any of the rest of her sister provinces which are traversed by the iron horse.

Population of Almeria.

I have always found great difficulty in obtaining satisfactory statistics relative to population, and chiefly because there appears to be a tendency to diminish the returns for certain local purposes. I have, however, just seen an important work giving an account of the population and of the edifices of every city, town, and village in this province,* from which I learn that on January 1, 1888, the population of this city, including the suburbs, was 56,211, and of the province 345,929.

Ramie-Bohemeria utilis ac Tenacissima.

This textile plant has been tried in these regions with considerable success. Mr. Andres Millé has published a succinct monograph on its cultivation and treatment.†

* "Nomenclator de España," Provincia de Almeria. Madrid, 1892.

† "Cartilla Agricola para el cultive del Ramie." Almeria, Julio de 1892. Por Don Andres Millé.

Annex A.—Return of Vessels of all Kinds which Visited Almeria during the Year 1893.

Nationality.	Entered.			Cleared.		
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.
Spanish	1,035	444,432	16,869	1,023	419,976	16,262
British	119	98,637	2,449	119	98,637	2,449
Swedish and Norwegian	33	18,142	517	34	18,546	527
French	9	5,572	188	9	5,572	188
Italian	9	4,827	112	9	4,827	117
German	5	2,108	79	5	2,108	79
Portuguese	4	350	31	5	475	38
Russian	3	1,423	38	3	1,423	38
Danish	3	1,255	40	3	1,255	40
Austrian	1	1,551	25	1	1,551	25
Total	1,221	578,597	20,348	1,211	554,650	19,763

Annex B.—Return of British Shipping at the Port of Almeria in the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.								Cleared.							
Total Number of Vessels.			Total Tonnage.			Total Number of Crews.	Total Value of Cargoes.	Total Number of Vessels.			Total Tonnage.			Total Number of Crews.	Total Value of Cargoes.
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.			With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		
							£								£
10	2	12	7,682	1,962	9,644	236	...	81	1	82	60,680	1,336	62,016	1,642	...

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.								Cleared.								
Countries whence Arrived.	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.	Countries to which Departed.	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.
	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.				With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		
								£									£
Spain	77	13	90	63,059	10,776	73,835	1,806	...	Spain	5	12	17	5,505	7,013	12,518	322	...
Greece	5	...	5	6,028	...	6,028	133	...	United States ...	15	...	15	20,404	...	20,404	402	...
Algeria	...	4	4	...	3,774	3,774	75	...	Algeria	2	1	3	1,993	643	2,636	57	...
France	2	1	3	835	875	1,710	47	...	Italy	1	...	1	1,033	...	1,033	19	..
Italy	1	1	2	620	870	1,490	37	...	Riff	1	...	1	30	...	30	7	...
Riff	2	...	2	820	...	820	85	...									
Egypt	1	...	1	1,336	...	1,336	30	...									
Total... ...	88	19	107	72,698	16,295	88,993	2,213	...	Total	24	13	37	28,965	7,656	36,621	807	...

Annex C.—Return of Vessels of all Kinds which Entered the Port of Almeria during the Years 1892–93.

Nationality.	1892.			1893.			
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	Fruit Carriers.
Spanish	982	350,512	15,321	1,036	444,402	16,959	13
British	149	139,975	5,056	119	98,037	2,442	71
Swedish and Norwegian	12	5,959	189	33	18,342	847	31
French	12	4,451	175	9	5,572	188	...
Italian	8	2,928	83	9	4,827	112	...
German	5	3,297	82	5	2,198	79	3
Portuguese ...	5	395	37	4	350	31	...
Russian	4	1,714	136	3	1,423	38	...
Danish	2	343	31	3	1,295	40	1
Austrian	1	980	26	1	1,591	25	1
Belgian	1	1,352	22	...	...	...	...
Total	1,181	520,806	21,188	1,221	578,397	20,548	120

Annex D.—Statistics of Fruit-carrying Vessels at Almeria during the Year 1893.

Nationality.	Number.	Net Tonnage.	Average Net Tonnage for each Vessel.	Average Crew for each Vessel.	Net Tonnage Proportionate to each Man.
British	71	60,287	849	21	40
Swedish and Norwegian	31	17,714	559	15	37
Spanish	13	8,035	618	24	26
German	3	1,492	497	15	30
Austrian	1*	967	967	26	37
Danish	1*	244	244	14	17

* Strictly speaking these two vessels should be excluded from this list as not offering a fair comparison.

Annex E.—TABLE showing the Current Prices of Almerian Market during 1893.

Articles.		From—	To—	From—	To—
		Ptas. c.	Ptas. c.	£ s. d.	£ s. d.
Cereals—					
Barley	Fanega* ...	6 50	7 0	0 4 4	0 4 8
Wheat	,, ...	14 0	15 0	0 9 4	0 10 0
Maize	,, ...	7 0	9 0	0 4 8	0 6 0
Dried vegetables—					
Haricot beans (long)	Arroba† ...	3 50	4 0	0 2 4	0 2 8
,, (short)	,, ...	2 75	3 25	0 1 10	0 2 2
Garbanzos (chick-peas) ...	,, ...	5 75	6 25	0 3 10	0 4 2
,, ,, from Castilla	,, ...	14 0	17 0	0 9 4	0 11 4
Lentils	,, ...	1 75	2 0	0 1 2	0 1 4
Canary seed	,, ...	5 0	6 0	0 3 4	0 4 0
Rice	,, ...	4 50	5 0	0 3 0	0 3 4
Flour	,, ...	4 25	4 75	0 2 10	0 3 2
Groceries—					
Sugar	,, ...	10 0	12 0	0 6 8	0 8 0
Cocoa nibs	Quintal‡ ...	165 0	170 0	5 10 0	5 13 4
Coffee	,, ...	165 0	170 0	5 10 0	5 13 4
Tea, green and black	Lb. ...	3 0	4 0	0 2 0	0 2 8
Salt fish, Norway	Quintal ...	40 0	41 0	1 6 8	1 7 4
Soap—					
Rocamora, brown	,, ...	29 75	30 25	0 19 10	1 0 2
Lacarcel, blue mottled ...	,, ...	34 75	35 25	1 3 2	1 3 6
Quesada, white and brown...	,, ...	17 0	25 0	0 11 4	0 16 8
Saffron albacete...	Lb. ...	30 0	35 0	1 0 0	1 3 4
Liquids—					
Olive oil	Arroba ...	12 50	13 0	0 8 4	0 8 8
Petroleum	Case ...	24 0	25 0	0 16 0	0 16 8
Wine	Arroba§ ...	8 0	9 0	0 5 4	0 6 0
Vinegar	,, ...	4 0	6 0	0 2 8	0 4 0

* 1 fanega = 1·52 imperial bushel.
† 1 arroba = 25·36 lbs. (avoir.).
‡ 1 quintal = 101·43 lbs. (avoir.).
§ 1 wine arroba = 3·55 imperial gallons.

CARTAGENA.

Mr. Vice-Consul Milvain reports as follows:—

Shipping.

Year.	British Vessels Entered.		British Vessels Cleared.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
1893	219	195,940	219	195,044

The falling-off in the number of British vessels entering this port in the past year has been very great, and the number is the smallest for many years past. The decrease as compared with 1892 is 153 ships with a tonnage of 155,926 tons. This may be put down entirely to the bad state of the iron ore trade.

Exports.

Iron ores.

The exportation of iron ores in 1893 from this district shows a very large decrease, the total quantity being only 220,290 tons.

whereas in 1890, 1891, and 1892 the quantities were 824,100 tons, 421,200 tons, and 518,000 tons respectively. Last year's quantity was sent to the following countries:—

Country.	Quantity.
	Tons.
United Kingdom	130,749
United States of America	26,071
France	16,540
Germany	2,000
Holland	30,950
Belgium	13,980

The large decrease in the exportation of these minerals is solely due to the small demand which prevailed not only in England but also in France, United States, and Germany. At the present time large stocks of both manganiferous and dry iron ores are on hand, and merchants are anxiously looking forward for a return of the trade which a year or two back was done with this district. Prices have now declined considerably, but exchanges greatly assist the exporters.

Zinc ores. 11,500 tons of zinc ores were sent to Antwerp. This is about the same quantity as was exported in 1892.

Esparto. Only 8,270 tons of esparto was shipped from this port during the last year, and this compared with previous year shows a decrease of 2,980 tons. The whole quantity was sent to the United Kingdom. The reason of the falling-off in esparto shipments is that other products, the principal one being wood-pulp, are now used very largely in the manufacture of paper.

Lead. Lead in pigs was exported as follows:—

To—	Quantity.	
	Silver Lead.	Soft Lead.
	Tons.	Tons.
United Kingdom	35,022	7,132
France	16,620	3,751
Belgium	5,150	..
Barcelona	..	1,680
Total	56,792	12,563
Grand total	69,355	

This is an increase of 5,613 tons over the quantity of 1892. The decrease in the exportation of soft lead is due to the fact that, owing to the low price of silver, the desilverising works of Mr. Ignacio Figueroa are and have been closed for some time past. The lead, therefore, which formerly was desilverised here goes forward for treatment to the several countries to which it is shipped.

Only 3 tons were shipped, and it was sent to France. This also is explained by the fact of Mr. Figueroa's Works being closed. Pure silver.

The shipment of lead ore in the natural state was as follows:— Lead ore.

To—	Quantity.
	Tons.
England	150
France	700
Belgium	450

Imports.

The quantities of coal and coke imported were:— Coals and coke.

Articles.	Quality.
	Tons.
Coal	63,072
Coke	29,580
Total	92,652

This total, as compared with 1892, shows a decrease of 13,330 tons. With the exception of 2,200 tons which came from Germany the whole was imported from England.

942 tons of pitch pine and Canadian deals, and 1,798 tons of red and white pine were imported during 1893. Wood.

From Norway 992 tons were received, and 580 tons from Newfoundland. Cod-fish

The new dry dock which I spoke of in my last report is now decided on by the Spanish Government and will be commenced before long. Contractors will be asked to give estimates for the construction. New dry dock.

Owing to the depression in the iron ore and lead trades, which has been very keenly felt in this district and in Cartagena and Portman especially which mainly depend upon the sierra for their prosperity, a large number of miners are out of employment. On account of this, great distress prevails not only amongst those directly connected with mining, but also amongst the tradesmen. Labour.

Dredging is still being continued and the quays are being extended. Along the principal quay called the "Muelle de Alfonso XII" the railway has been laid with a view to facilitating the handling of goods coming to and going out of the country. Port works.

The crops of last year have been very good owing to the plentiful fall of rain in the district. Agriculture.

The public health has been bad owing no doubt to the lack of proper sanitary arrangements. The death rate was 34·06 per thousand. Diphtheria is very common especially amongst children, and typhus fever, small-pox, and fever and ague have caused a considerable number of deaths. Public health

Silk.

Silkworm culture is carried on to some extent in the province of Murcia.

About 450,000 kilos. of silk was produced during the year 1893, and about 6,000 kilos. of fishing gut, being a little in excess of the quantity produced during the year 1892.

The prices ruling have been about the same during the last 2 years, viz.: 2 pesetas 80 c. per kilo. of silk in the cocoon, and about 35 to 40 pesetas per kilo. of fishing gut.

The native silkworm seed, which is considered the best here, is of a pale yellow colour, and is known here as "Antrado." 1 oz. of this seed will produce from 100 lbs. to 125 lbs. of silk. The price of this seed is about 20 pesetas to 25 pesetas per oz. according to the quantity in hand.

Mode of culture.

The seed is either put out in the sun or is put into the beds of the people who rear them, during the first week in March, if the weather is favourable, the silkworm will be hatched within 7 days. They are then placed upon sheets spread upon large trays made of cane; they are put out into the sun during the day and brought indoors at night. They are then fed on mulberry leaves for from 6 to 7 days, when the worm sleeps for 2 days, changes its skin and begins to feed again for 7 days more, sleeps 2 days, changes its skin a second time, and this is repeated thrice. After the third sleep the worm feeds for 7 or 8 days, and then begins to spin on bunches of esparto grass placed for that purpose. On the eighth day after the worm has begun to spin, the cocoon is taken down and either sold at once, or, if prices do not suit, the cocoon is put into a slow oven and the worm is smothered. The cocoon can then be kept until prices suit.

Each ounce of silkworm seed is calculated to eat 2,600 lbs. of mulberry leaf.

If the silkworm is intended for fishing gut, the larger worms are selected on leaving the feeding trays to spin. They are put into vinegar, salt, and water, the strength of which liquid is tested until a fresh laid egg will float in it. The worms are left in this liquid over night, and early next morning are drawn by taking hold of the head and tail, and gentle force used. They are then put into clear water and washed, and after being well cleaned with chamois leather are dried in the sun. Each worm yields two pieces of gut. Women are employed in this operation and are paid 2 pesetas and their food per day.

When seed for the coming year is desired, a few cocoons are left where the worm has spun them, and on the fifteenth day after beginning to spin, a moth is produced which deposits its eggs on a cloth placed there for that purpose and then dies. The cloth and seed are then put away until the coming year.

Linares.

Mr. Vice-Consul Whyte reports as follows:—

The year 1893 has been absolutely the most disastrous known in the annals of lead mining in Linares.

The average price of lead in London was— Price of lead and silver.

For—	Per Ton.
	£. s. d.
1892..	10 8 11½
1893..	9 13 7¼
Less	0 15 4¼

The average price of silver in London was—

For—	Per Oz.
	s. d.
1892..	3 3 2/16
1893..	2 11 2/16
Less	0 4 3/16

The number of mines registered was 932, some 100 less than in 1892, and of these only 198 were actually working. Mines working.

The production, as stated officially, was as follows, viz.:— Production.

	Quantity.
	Tons.
Galena	83,853
Carbonates	12,933
Total	96,786

Equivalent to 71,033 tons of metallic lead.

In considering the production it must ever be borne in mind that the tax of 2 per cent. on the gross produce continues to offer a strong inducement to miners to understate the amount of their raisings, and that consequently the output of the district is considerably in excess of that shown above.

The declared value of the production for 1893 is given as 11,587,039 pesetas. Value.

The average prices shown for galena being 129·50 pesetas per ton, and for carbonates 56·30 pesetas per ton.

Only in the case of a few of the best mines, or those working under exceptionally favourable circumstances (probably not more than eight in all), can any profits have been realised, and in most Mining results.

instances, the greatest difficulty must have been experienced in even paying the cost of working.

Present condition of mining industry.

Unfortunately there is no apparent prospect of any amelioration taking place in the mining industry of Linares, either promptly or remotely.

The lowness of prices is evidently due to excess of production, and until this ceases there is no reason to suppose that the value of lead or silver will improve.

The actual price of the former being 9*l.* 5*s.* per ton, and of the latter $27\frac{5}{16}d.$ per oz.; both showing a considerable fall on the average prices of 1893. It may be mentioned, as having an important bearing on the interests of Linares, that the production of one mine in Australia for the 6 months ending November 30 of last year is alone given as 25,822 tons of lead, and 6,533,232 ozs. of silver.

The ore raised being 246,520 tons, at the low cost of 2*l.* 13*s.* 10*d.* per ton.

Tax on explosives.

At the end of 1893, the law imposing a tax on explosives came into force, this being on :—

		Amount.
		Pesetas c.
Dynamite	Per kilo.	1 0
Caps	Per 100 kilos. ..	0 10
Safety fuze	Per 200 metres ..	0 15

The syndicate formed of manufacturers of dynamite, which has rented the above from the Government, has since February 1 lessened the import on dynamite from 1 peseta to 60 c.

As, however, the average quantity of dynamite used is 2 kilos. per ton of ore raised, the tax, even thus reduced, presses heavily on the already suffering district, and would represent, on a production similar to the official one of 1893, an increased expenditure of 116,143 pesetas.

It is generally the case that old established industries when threatened with extinction, especially those that have at one time been extremely remunerative, make prolonged efforts to stave off if they cannot avert the catastrophe, and naturally Linares is now doing so.

It seems hardly probable, however, that this district should long continue to survive as an important lead producing one, unless actual circumstances should unexpectedly alter.

If the price of silver were to continue to fall to a still lower and hitherto unknown point, the result would no doubt be that of stopping the working of many silver lead mines in different parts of the world which now produce large quantities of lead almost as a bye product, and if this should happen the value of the latter metal might be expected to improve.

Smelting

The ore smelted in Linares during 1893 was about 60,000 tons, equal to 46,200 tons of metallic lead.

Silver obtained was about 385,800 ozs.

Coal consumed can be estimated at 76,000 tons, and coke at 4,500 tons. Both coal and coke continue to be chiefly supplied from Belmez, with little variation in their respective prices, viz., 1*l.* 15*s.* 4*d.* per ton and 2*l.* per ton delivered at the mines. Coal and coke.

The general state of business in Linares may be described as having been completely stagnant. General state of business.

The building trade (surest index of the fiscal condition of the district) being altogether paralysed.

It is, indeed, curious to note how one evil produces another; owing to a lack of purchasers, shopkeepers are unwilling or unable to renew their stocks, and consequently it is extremely difficult to obtain anything required, and so even the small amount of money that would otherwise have been spent in the town is diverted to Madrid or other capitals.

The rate of exchange on London during 1893 ruled even higher than in 1892, a circumstance greatly to the advantage of the mining interests of the place. Exchange.

The population of Linares again shows a decrease on that of former years, being actually about 40,000. Population.

The register for 1893 gives the following, viz. :— Civil register.

	Number.
Births	1,188
Deaths	1,340
Marriages	206

The above number of deaths in a population of 40,000 persons gives the rate of mortality at 33·50 per 1,000. Public health

The general state of the public health was normal.

Some difficulties appear to have arisen in the construction of the Linares-Almeria Railway, and all work on the Linares portion is suspended. New railways.

Crops.

The harvest of 1893 was somewhat above the average. The produce of this municipal district being as follows, viz. :— Harvest.

Articles.		Quantity.
Wheat	Bushels	21,399
Barley	„	28,675
Beans	„	2,790
Oil	Gallons	31,807

The average prices of the above were :— Prices.

Articles.		Prices.
		s. d.
Wheat	Per bushel.. ..	6 8
Barley	,, ...	3 0
Beans	,, ...	4 6
Oil	Per gallon.. ..	2 11

Municipal dues.

The dues levied on the following articles were :—

Articles.		Amount.
		Pesetas c.
Wheat and flour	Per 100 kilos. ..	2 10
Barley	,, ..	0 80
Beans	,, ..	0 44
Oil	,, ..	22 0
Wine	Per 100 litres ..	17 50

Disease amongst cattle.

Cases of small-pox amongst sheep were somewhat prevalent during 1893, and some cases of anthrax were noted amongst horned cattle, neither epidemic being of a malignant nature.

Prospects of coming harvest.

The autumn sowing was effected under favourable circumstances, and although rain is now wanted the crops generally bear a promising appearance.

Owing to a dry season the quantity of caterpillars amounts almost to a plague, and may possibly occasion considerable damage.

MAZARRON.

Mr. Consular-Agent Pearse reports as follows :—

Trade.

The trade of Mazarron during the year 1893 shows a falling-off in the exports as compared with that of 1892, due entirely to the almost complete stoppage of the exportation of iron ore from this district; the figures are, however, somewhat better than they otherwise could have been from the fact that about 6,000 tons of silver lead, which in 1892 were exported in foreign vessels, have, in 1893, been shipped in British steamers. As regards the two chief branches of commerce in this district, viz., the exportation of silver lead and the importation of coals and coke, no appreciable difference is observable between the totals in the 2 years.

Shipping.

The total number of British steamers cleared at Puerto de Mazarron in 1893 was 40 with a total register of 33,782 tons, as compared with 50 steamers with 41,722 tons in 1892.

Imports in British Steamers.

Articles.	Quantity.
	Tons.
Coals	22,090
Coke	5,460
Total	27,550
„ in 1892	30,779

Exports of British Steamers.

Articles.	Quantity.
	Tons.
Silver lead	17,300
Iron ore	1,550
Total	18,850
„ in 1892	37,140

RETURN of Imports and Exports by Coasting Vessels at Puerto de Mazarron in the Year 1893.

Description of Goods.		Importation.		Exportation.	
		Foreign and Colonial Goods.	National Goods.	Foreign and Colonial Goods.	National Goods.
Cement and hydraulic lime ...	Kilos. ...	22,400	[illegible]	...	[illegible]
Building materials	,, ...	4	[illegible]	...	1,430,000
Coke	,, ...	85,000	[illegible]	...	45,000
Pitch and tar	,, ...	7,583	[illegible]	...	[illegible]
Argentiferous galenite	,, ...	...	[illegible]	...	[illegible]
Silver-lead ore	,, ...	...	[illegible]	...	[illegible]
Blende ore	,, ...	...	[illegible]	...	[illegible]
Iron ore	,, ...	...	6,825,000	...	[illegible]
Glass	,, ...	78	[illegible]	...	...
Bricks and tiles	,, ...	63,000	[illegible]	...	...
,, ...	,, ...	...	[illegible]	...	...
Common earthenware	,, ...	...	4,991	...	...
Iron in pigs...	,, ...	1,600	[illegible]	...	4,468
,, in bars and (plates) sheets...	,, ...	28,450	[illegible]	...	[illegible]
,, manufactures...	,, ...	76,985	[illegible]	...	[illegible]
Silver-lead in bars...	,, ...	...	[illegible]	...	...
Pea-nut oil	,, ...	27,999	...	...	...
Vegetable produce (not otherwise expressed)	,, ...	...	[illegible]	...	[illegible]
Paints	,, ...	141	[illegible]	...	[illegible]
Chemicals	,, ...	23,821	[illegible]	...	...
Common soap	,, ...	...	[illegible]	...	...
Mining powder, match-rope, &c.	,, ...	9,278	[illegible]	...	...
Cotton textures	,, ...	96	[illegible]	...	...
Fishing-nets and tackle	,, ...	[illegible]	[illegible]	...	...
Deals and timber	Cubic met.	[illegible]	[illegible]	...	[illegible]
Wood, manufactured	Kilos. ...	447	[illegible]	...	[illegible]
Staves	,, ...	[illegible]	[illegible]	...	...
Charcoal	,, ...	...	[illegible]	...	...
Firewood	,, ...	...	[illegible]	...	...
Cork	,, ...	...	[illegible]	...	...
Esparto	,, ...	...	[illegible]	...	[illegible]
,, manufactured	,, ...	...	...	...	[illegible]
Palm branches	,, ...	...	...	...	[illegible]
Rags for paper manufacture ...	,, ...	...	...	...	[illegible]
Grease	,, ...	[illegible]	...	...	...
Manure	,, ...	...	...	...	[illegible]
Machinery	,, ...	[illegible]	[illegible]	...	[illegible]
,, ...	,, ...	[illegible]	...	...	...
Salt fish	,, ...	[illegible]	[illegible]	...	...
Rice	,, ...	...	[illegible]	...	...
Barley	,, ...	...	[illegible]	...	[illegible]
Indian corn	,, ...	...	...	...	[illegible]
Wheat	,, ...	...	...	...	[illegible]
Grain (not otherwise expressed)	,, ...	...	...	...	[illegible]
Flour	,, ...	[illegible]	[illegible]	...	...
Vegetables	,, ...	...	[illegible]	...	[illegible]
Fruits	,, ...	[illegible]	[illegible]	...	...
Sugar	,, ...	[illegible]	[illegible]	...	...
Alum...	,, ...	...	...	...	[illegible]
Oil	,, ...	[illegible]	[illegible]	...	...
Spirits	Hectolitres	[illegible]	[illegible]	...	...
Beer	,,	[illegible]	...	...	...
Wine, common	,,	...	[illegible]	...	...
Canary seed	Kilos. ...	...	[illegible]	...	...
Straw and other forage	,, ...	...	[illegible]	...	...
Bran	,, ...	...	[illegible]	...	...
Various other articles	,, ...	[illegible]	[illegible]	...	[illegible]
Total	**...**	[illegible]	[illegible]	...	[illegible]
Grand total	**...**	[illegible]		...	[illegible]

IMPORTS IN FOREIGN VESSELS.

Articles.		Quantity.
Slag	Tons	2,710
Machinery	„	507
Coals	„	914
Deals	Cubic metres	2,417
Total	Tons	4,131
	Cubic metres	2,417
„ in 1892..	Tons	9,049

EXPORTS IN FOREIGN VESSELS.

Article.	Quantity.
	Tons.
Silver lead	1,381
Total in 1892	6,765

Silver lead ore.

The total output of the Mazarron mines in 1893 was about 893,800 quintals as compared with about 860,000 quintals in 1892. Most of this ore is smelted at the magnificent lead works of the "Compañia Metalurgica de Mazarron," situated at this port; the remainder is shipped to Cartagena and smelted in that neighbourhood. The following table will show the approximate production of each mine now producing, with contents of silver per quintal of mineral:—

TABLE showing the Approximate Production of each Mine now Producing, with Contents of Silver per Quintal of Mineral.

Name of Mine.	1892.			1893.			By whom worked.
	Production.	Lead.	Silver.	Production.	Lead.	Silver.	
	Quintals.	Per cent.	Ounces.	Quintals.	Per cent.	Ounces.	
Impensada	98,000	60	2·50	72,000	60	2·50	Compañia de Aguilas
Triumfo	264,000	66	3	270,000	66	3	„ „
Santa Ana	144,000	60	2	216,000	60	2	„ „
San Antonio	36,000	64	3	48,000	64	3	„ „
Fuensanta	24,000	50	2·08	22,000	50	2·08	Clemente Navarro
Usurpada	18,000	60	2·60	29,000	60	2·60	Franco. Vera Velez
Santa Isabel	40,000	64	3	48,000	64	3	Compañia de Escombrera-Bleyberg
San Carlos	10,000	70	2·60	8,000	70	2·60	Miguel Zapata
San José	36,000	64	3·20	12,000	64	3·20	Sociedad San José
Talia	182,000	70	2·80	168,000	70	2·80	Pio Wandosell
San Vicente	8,000	56	2·80	500	56	2·80	Miguel Zapata
Vista Alegre	50	40	3	300	40	3	Sociedad Vesta Alegre
Total	860,050	..	..	893,800	..	..	

Grapes. The grape crop in Totana has yielded about 45,000 arrobas (1 arroba equals 11½ kilos.).

Oranges. The harvest in Totana has been a very good one both as regards quantity and quality, about 50,000 cases having been exported.

Lemons. The same may be said of this fruit, of which about 16,000 cases have been exported. All this fruit has been forwarded to the French markets, principally to Paris.

Accidents. A serious accident occurred in the Impensada mine in February last, caused by the introduction of carbonic acid gas, whereby 28 miners perished, and amongst them an English mechanical engineer, Mr. John Handforth.

Public works. With the object of endeavouring to avoid in future the disastrous floods in the plain of Murcia, caused by the overflowing of the Segura River, a canal is being dug from a point called El Requero to Las Canadas del Romero, whence it will enter the Rambla de las Morera which has its mouth at El bol nuevo, about 3 miles to the west of this port. It is hoped that, when concluded, this canal will carry away a great part of the water which, after heavy rainfalls, has invariably caused the overflowing of the Segura and thus avoid disasters. This canal is, I understand to be finished by contract in about 4 years.

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1894.

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No. 1454.

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SPAIN.

REPORT FOR THE YEAR 1893

ON THE

TRADE, &c., OF THE CONSULAR DISTRICT OF BARCELONA.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1225.

Presented to both Houses of Parliament by Command of Her Majesty,
AUGUST, 1894.

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SPAIN.

BARCELONA.

Consul Wyndham to the Earl of Kimberley.

My Lord, *Barcelona, July* 17, 1894.

I HAVE the honour to forward, enclosed herewith, Reports on Commerce, &c., for 1893, received from the Vice-Consuls at Alicante, Tarragona, Gandia, Jabea, Valencia, and Cullera, including the Consular Agency at Burriana.

I regret that I am unable to prepare any Report on the Commerce of Barcelona for the past year myself as I have only a few days since joined this post, but will endeavour to forward, as soon as possible, a Report on labour and wages in this district.

I have, &c.

(Signed) WM. WYNDHAM.

Reports on the Trade and Commerce of the Vice-Consulates at Alicante, Tarragona, Gandia, Jabea, Valencia, and Cullera, and Consular Agency at Burriana.

ABSTRACT of Contents.

	PAGE
Alicante—	2
General remarks; imports; exports; local improvements	2
Table of imports; table of exports; shipping	3
Tarragona—	4
Crops; imports; exports	4
Shipping	5
Table of imports; table of exports	6
Gandia—	7
General remarks; table of exports	8
Table of imports; table of shipping	9
Shipping return: Entered	10
„ Cleared	11
Jabea—	12
Trade and commerce; shipping and navigation	12
Population and industries	13
Public works	14
Valencia, Cullera, and Burriana—	14
General trade	14
Shipping; tinware	15
Return of all shipping, Valencia	16
Table of exports; table of imports	17
Return of British and foreign shipping, Valencia, entered	18
„ „ „ „ cleared	19
Return of British and foreign shipping, Cullera	20
Table of imports and exports, Cullera	21
Table of shipping, Burriana, entered	22
„ „ „ cleared	23
Imports and exports, Burriana	24

ALICANTE.

Mr. Vice-Consul Cumming reports as follows:—

General. The past year has been most unsatisfactory for commerce in this district. The country is in an impoverished state; wine-growers unable to realise their crops at any remunerative prices; credit generally bad and all business men complaining of losses by bad debts; taxation increasing; labouring classes unable to find employment; all has combined to cause general uneasiness

Exchange. and dissatisfaction. Also the rate of exchange has gone still further against this country. At commencement of the year exchange was quoted about 29 pesetas 50 c. per 1*l.*, but since rose to fully 31 pesetas, a difference against Spain of 5 per cent.

Tables. Annexed tables give returns of shipping, importations, and exportations.

Shipping. Foreign shipping shows a slight decrease on previous year, while movement of Spanish shipping has increased.

Importations. The decrease in importations has been general in all articles and a reference to the table almost renders further comment

Cod-fish. unnecessary. The decrease in cod-fish has been solely in importation of British cure from Newfoundland.

Nationality.	Quantity.	
	1892.	1893.
	Tons.	Tons
British	4,040	2,100
Norwegian	770	940
French	90	60

Exportations. Wine. In exportions the continued falling-off in the wine trade is the salient point, and is all the more remarkable when it is borne in mind that the exportation of wine at this port reached the quantity of 2,075,000 hectolitres in 1891 and has now dwindled down to only 860,000 hectolitres in 1893.

Almonds. The crop of almonds was more abundant than previous year, but the fruit resulted of small size and poor quality and prices ruled considerably cheaper.

Tramway company. One local improvement in this town during the past year that may be mentioned, has been the establishment of tramway cars crossing the town in sundry directions by a company, with funds raised here by 2,000 shares of 250 pesetas each, which were promptly subscribed, and the affair is reported to be working prosperously.

RETURN of Principal Articles of Import to Alicante during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Coals	Tons ...	5,400	3,500	13,300	7,500
Railway material, iron, &c. ...	,, ...	14,100	70,000	18,000	100,000
Dried cod-fish	,, ...	3,100	52,000	4,900	89,000
Sugar	,, ...	250	7,000	2,100	62,000
Jute	,, ...	700	8,000	830	11,000
Petroleum	,, ...	...	...	18,000	...
,, ...	Hectolitres	1,000,000	...	...	...
Spirits for strengthening wine ...	,,	...	...	2,000	3,500
Staves	Pieces ...	290,000	11,000	1,285,000	47,500
Timber	Cub. met.	17,000	28,000	38,000	65,000
Cotton and woollen goods ...	Tons ...	100	...	900	...

RETURN of Principal Articles of Export from Alicante during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Wine...	Hectolitres	860,000	700,000	1,500,000	1,200,000
Lead	Tons ...	13,000	110,000	8,600	80,000
Licorice root	,, ...	1,100	13,000	1,450	17,000
Almonds	,, ...	770	55,000	300	32,000
Esparto and esparto goods ...	,, ...	400	400	2,300	2,500
Aniseed	,, ...	260	10,000	140	4,600
Old railway iron	,, ...	1,400	1,000	4,600	4,000

RETURN of Foreign Shipping at the Port of Alicante during the Year 1893.

Nationality.	Number of Vessels.	Tons.
British	54	32,718
French	135	119,251
Swedish and Norwegian	72	41,372
Italian	37	5,473
Russian	8	6,421
Danish	4	3,080
Belgian	4	4,980
German	3	2,435
Austrian	3	2,710
Portuguese	3	1,560
Dutch	3	2,550
Monaco	2	180
Greek	1	246
Spanish	151	73,890
,, (coasting)	1,206	615,163
Total, 1893..	1,686	912,029
,, 1892..	1,325	764,734

Tarragona.

Mr. Vice-Consul Morgan reports as follows:—

Crops. The crops in this district this year were rather abundant, wine turning out over the average both in quantity and quality, and nuts and almonds greatly in excess of usual yield, quality, however, being rather inferior. Oil is likely to result a small crop, but large stocks are still held over from last season and this excess will in some measure compensate for the expected short outturn this season.

Exports. The export trade has been active, the ruling low prices enlivening demand and increasing the consumption of the various articles produced in this district.

Imports. There is nothing special to comment upon in connection with the import trade, except the falling-off of imports from most foreign countries, due, no doubt, to general depression and the depreciation of currency in this country. The United States of North America with crude petroleum, and Russia with grain are the only countries that have increased to any extent their importation into Tarragona, but a large quantity of latter produce after being ground into flour is reshipped coastwise, local milling enterprise enabling importers to compete favourably with other ports along the coast.

Shipping. British shipping shows an increase of some 28,000 tons over 1892, which is considerably more than the proportion corresponding to the total increase of figures since last year.

Prospects. The prospects of this part of the country are very disheartening. Money is extremely scarce, and farmers, generally speaking, are three or more years behind-hand with payments. The value of the principal crop of this district, viz., wine, is abnormally low, as a rule insufficient to cover cost of production, which owing to mildew and other infirmities of the vine is becoming greater every year. There is no doubt that prices are considerably influenced by the excessive production, trade with France being now very limited as compared with former years, owing to increased tariffs and the yearly increasing yield of French wines. The only apparent solution for proprietors to avoid ruination is to uproot a portion of their vines, and go in for the cultivation of cereals or nuts, which always have a market, more or less good, according to extent of crops in other countries, but certainly likely to give a better result than vines, so long as the over-production continues. By thus limiting supply proprietors would obtain more remunerative prices, and other crops would, at the worst, assist them in paying expenses, thus helping to bring about a healthier state of things; but, unfortunately, although farmers are aware of the advisability of a change, there is such a want of initiative among them that nobody cares to make a beginning, and, therefore, there appears to be little prospect of an improvement for some time to time.

The annexed returns refer solely to import and export trade by sea.

RETURN of all Shipping at the Port of Tarragona during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	88	84,683	88	84,683
Spanish	91	11,993	441	281,827	532	293,820
Swedish and Norwegian	...	...	68	34,547	68	34,547
French	51	3,450	32	21,495	83	24,945
Danish	2	996	15	10,978	17	11,974
Italian	51	10,016	2	1,311	53	11,327
Greek	15	5,537	6	5,110	21	10,647
Russian	2	981	7	4,686	9	5,667
Dutch	...	...	4	3,355	4	3,355
Belgian	...	...	3	3,271	3	3,271
German	...	...	4	1,846	4	1,846
Austro-Hungarian	1	430	1	856	2	1,286
Total	213	33,403	671	453,965	884	487,368
,, for the year preceding ...	...	...	...	...	716	407,140

CLEARED.

Nationality.	Sailing.		Steam.		Total	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	88	84,683	88	84,683
Spanish	89	11,111	442	281,950	531	293,061
Swedish and Norwegian	...	...	67	34,288	67	34,288
French	50	3,376	32	21,495	82	24,871
Danish	2	996	15	10,978	17	11,974
Italian	51	10,224	2	1,311	53	11,535
Greek	17	6,508	5	4,255	22	10,763
Russian	3	1,511	7	4,686	10	6,197
Dutch	...	...	4	3,355	4	3,355
Belgian	...	...	3	3,271	3	3,271
German	...	...	4	1,846	4	1,846
Austro-Hungarian	1	430	1	856	2	1,286
Total	213	34,156	670	452,974	883	487,130
,, for the year preceding ...	...	...	...	...	712	405,427

RETURN of Principal Articles of Import to Tarragona during the Year 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Wheat, rice, barley, &c.	Tons ...	50,675	365,593	23,896	230,330
Tobacco	...	...	152,534	...	182,440
Petroleum ...	Bulk ...	...	73,180	...	...
	Refined and bulk ...	...	...	...	59,768
Salt fish	Tons ...	3,349	67,767	3,839	75,150
Empty casks	Number ...	62,002	62,002	40,267	40,267
Staves	Mille ...	1,757	15,280	588	10,475
Coal, charcoal, &c. ...	Tons ...	28,631	28,631	34,600	40,100
Spirits	Casks ...	1,330	19,982	2,289	30,906
Wood, deals, &c. ...	...	...	17,410	...	27,587
Chemical products ...	...	...	15,628	...	10,410
Brimstone	Tons ...	2,973	14,500	2,802	31,274
Potato flour ...	Bags ...	6,490	7,490	...	...
Guano	Tons ...	707	6,688	1,170	11,630
Iron and manufactures	...	...	6,550	...	48,772
Oil	...	...	4,840	...	8,000
Other articles	...	...	44,405	...	53,430
Total		...	929,898	...	870,248

RETURN of Principal Articles of Export from Tarragona during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Wine	Casks ...	91,179	790,892	87,806	747,975
Filberts	Bags ...	134,909	144,119	94,544	108,041
Spirits	Pipes ...	6,782	92,978	4,715	54,172
	Demijohns	2,715		650	
Almonds	Bags ...	49,103	78,460	16,523	34,695
Flour	Tons ...	6,903	70,567	1,847	17,592
Oil	Casks ...	1,343	28,680	1,154	26,134
	Cases ...	...	...	115	
Empty casks	Number ...	6,733	6,733	5,493	5,493
Paper	...	...	5,690	...	5,675
Petroleum	...	...	3,127	...	3,000
Other articles ...	...	...	12,560	...	10,554
Total	...	...	1,233,756	...	1,007,283

RETURN showing Total Value of all Articles Exported from and Imported to Tarragona from and to Foreign Countries during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain and Colonies	279,988	232,700	34,419	73,677
Spain	216,685	120,881	278,113	335,533
France	532,737	515,592	72,557	75,599
River Plate and Ecuador	81,480	61,120	..	..
United States of North America	38,640	26,130	98,110	65,218
Germany	32,370	29,100	9,498	10,256
Holland..	13,970	7,020	..	..
Denmark	8,960	5,030	..	..
Belgium	8,010	4,880	4,030	3,090
Italy	7,194	..	30,471	25,383
Russia	5,450	5,530	354,060	230,139
Monaco	5,056	..	..	..
Sweden and Norway ..	3,216	..	48,550	46,153
Turkey	..	..	..	5,200
Total	1,233,756	1,007,983	929,808	870,248

GANDIA.

Mr. Vice-Consul Romaguera reports as follows :—

On January 24 the port of this town and railway of Alcoy to the said port were inaugurated, both of these belonging to an English company called the Alcoy and Gandia Railway and Harbour Company, Limited. The results obtained in the first 11 months of the working of the business may be qualified as bad as regards the railway, and as moderately good as regards the port. I have been informed that the entries of the former have not covered the expenses, and the cause has been that besides the traffic on the line being scarce there were a great number of men employed with very high salaries. Lately they have reduced this number, and are making many other economies. As regards the port, the exportation has been about the same as before there was a port, but the importation and the number of steamers have augmented considerably.

Year.	Number of Vessels.	Tons.	Quantity Imported.
			Tons.
In 1892	351	95,445	7,[illegible]69
1893	531	170,512	18,776

It must be remembered that the importation of 1892 is made up almost wholly of the coal and material for the construction of the railway and port, so that one may say that the 18,776 tons imported in the year 1893. 16,000 tons are owing to the facilities that the port offers. The business was projected with well-founded hopes, but as there has, unfortunately, come the general crisis to the country, and in particular the wine crisis, which has taken from the calculation of the entries 50 per cent., these hopes have not been realised. If the wine proved acceptable abroad, and an economical tariff could be obtained, and a combined service of trains from Carcagente to Denia, which doubtless would bring to this port a great cargo of oranges and raisins, the business would then augment considerably.

Drinking water.

The water which is now consumed in this town for drinking is bad for health. Fortunately, in a few months' time we shall have some excellent and potable waters. The firm Macnaughton Brothers have the concession of this service, valued at 6,000*l*. This great improvement is looked upon by everybody with great interest.

Tobacco.

In consequence of the depreciation of the raisin business, the principal crop of this district, some people are thinking of starting the cultivation of the tobacco plant, which would bring a good result here, but to be able to cultivate it it is necessary to obtain the consent of the Government, and this is generally thought to be difficult to obtain.

Agricultural products.

The productions of this country (raisins, oranges, tomatoes, onions, &c.) have this year been moderately good, but the prices obtained have been generally low.

RETURN of Principal Articles of Export from Gandia during the Year 1893.

Articles.	Quantity.	Value.
	Tons.	£
Oranges	7,454	49,693
Raisins	4,499	71,984
Tomatoes	7,628	45,767
Various fruits	2,127	10,135
Various articles	1,022	8,500
Total	22,730	186,079

RETURN of Principal Articles of Import to Gandia during the Year 1893.

Articles.	Quantity.	Value.
	Tons.	£
Coal	9,294	13,941
Guano	2,914	29,144
Timber	1,590	4,770
Flour	1,097	16,886
Rags	725	3,500
Machinery and railway material ..	200	7,924
Various articles	2,956	55,430
Total	18,776	131,595

RETURN of all Shipping at the Port of Gandia during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	89	54,383	89	54,383
Spanish	171	7,000	239	94,101	410	101,101
Norwegian	...	...	17	7,001	17	7,001
French	...	...	2	1,799	2	1,799
Russian	...	...	1	649	1	649
Italian	1	349	...	...	1	349
Swedish	1	263	8	4,561	9	4,824
German	...	...	2	1,406	2	1,406
Total	173	7,612	358	163,900	531	171,512

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	89	54,383	89	54,383
Spanish	168	6,890	238	93,910	406	100,800
Norwegian	...	...	17	7,001	17	7,001
French	...	...	2	1,799	2	1,799
Russian	...	...	1	649	1	649
Italian	1	349	...	...	1	349
Swedish	1	263	8	4,561	9	4,824
German	...	...	2	1,406	2	1,406
Total	170	7,502	357	163,709	527	171,211

Return of British and Foreign Shipping at Gandia (Spain) during the Year 1893.

Entered.

Country	With Cargoes.			In Ballast.			Total.			Value of Cargoes.
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	
										£
Great Britain ..	8	6,504	126	81	50,533	1,276	89	57,037	1,402	..
Spain	258	7,446	3,329	152	32,152	1,632	410	39,598	4,961	..
Norway	4	2,720	55	13	5,512	194	17	8,232	249	..
France	2	562	49	..	..	..	2	562	49	..
Russia	1	965	21	..	..	..	1	965	21	..
Italy	1	180	9	..	..	..	1	180	9	..
Sweden	1	399	9	3	4,561	134	9	4,960	143	..
Germany	..	..	..	2	1,406	35	2	1,406	35	..
Total ..	275	18,776	3,598	256	94,164	3,271	531	112,940	6,869	131,595

RETURN of British and Foreign Shipping at Gandia (Spain) during the Year 1893—continued.

CLEARED.

Country.	With Cargoes.			In Ballast.			Total.			Value of Cargoes.
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	
										£
Great Britain ..	81	11,818	1,275	8	3,890	127	89	15,708	1,402	..
Spain	288	8,011	3,344	118	8,912	1,590	406	16,923	4,934	..
Norway	17	1,954	249	..	..	..	17	1,954	249	..
France	..	..	..	2	1,799	49	2	1,799	49	..
Russia	..	..	..	1	649	21	1	649	21	..
Italy	..	..	..	1	349	9	1	349	9	..
Sweden	8	613	134	1	263	9	9	876	143	..
Germany.. ..	2	334	35	..	..	..	2	334	35	..
Total ..	396	22,730	5,037	131	15,862	1,805	527	38,592	6,842	186,079

Jabea.

Mr. Vice-Consul Innes reports as follows :—

Trade and Commerce.

This being a purely agricultural district, few features of special interest call for attention. The past year has been the worst of a series of bad ones for trade here, agricultural products having depreciated gradually in value till they have now reached a point below which it is impossible to go without reducing the greater part of the population to sheer want.

The principal products of this district are raisins, almonds, and wine. Cereals are only grown for the rotation of crops, to rest the ground previously occupied by vines. Owing to the excess of production of raisins, the bad state of trade in England limiting demand, together with the considerably lower duty payable there on currants, and the trade difficulties in America, enhanced by the increase of duty imposed by the MacKinley Bill of 1891, the exportation of raisins has been carried on under great difficulties and at constantly falling prices. In sight of this a great many of the farmers in this and neighbouring towns have at considerable expense changed their mode of preparing the raisins, hoping that the substitution of muscatel or sun-dried raisins for the ordinary valencia or scalded ones would improve the demand and their financial outlook. This has resulted to a limited extent, but a want of the technical knowledge required for the new mode of preparation, the reluctance, and in many cases the inability, to incur the increased expenditure necessary to give full effect to same, and the absence of a direct foreign demand for an article heretofore exclusively produced and shipped at Malaga have jointly prevented the full improvement which was hoped for. The growers have principally shipped their muscatel raisins to the aforesaid port of Malaga for sale there to merchants, who, after re-packing under their well-known brands, sell them at a good profit as the product of their own district. The Malaga municipality during the past year, with the object evidently of discouraging the importation of Jabea and Denia fruit, which sold cheaply there, lowered the value of their local product, imposed an octroi, or consumo tax, which has, of course, prejudiced the fruit shipped from here. To escape this a good many have shipped on consignment to Barcelona and other Peninsular markets, and Marseilles has also received a quantity which has sold at fairly remunerative rates.

Shipping and Navigation.

The above-mentioned new departure in the raisin trade being here entirely in Spanish hands, and, as I have said, principally

destined to Spanish markets, has decreased considerably the cargo shipped by British vessels, more especially as they are not allowed to do any of the coasting trade. I should mention, however, that the Spanish line of steamers doing the greater part of the coasting business is largely owned and managed by British subjects.

The vessels cleared from this port during the past year consisted of 107 Spanish, 7 British, 2 Norwegians, and 1 Swede, and of these 80 were steamships and 37 sailing vessels.

The total importations were:—

Articles.	Quantity.
	Quintals.*
Flour	16,600
Wheat and other cereals	3,000
Sulphur and guanos	7,000
Lumber, rough and sawn, for raisin boxes	26,000

* 50 kilos.

valued at 459,400 pesetas (15,310*l.*).

The total exportations were:—

Articles.	Quantity.
	Quintals.
Raisins	43,000
Onions	3,200
Wine	1,100
Ground or pea-nuts	8,000
Green fruits..	1,500

valued at 931,300 pesetas (31,040*l.*).

Rates of freight to the United Kingdom have averaged 20*s.* and 10 per cent., and to the United States of America, 25*s.* and 10 per cent. per ton.

The gratuities to officials, customary at this as at other Spanish ports, prejudice considerably British and other foreign vessels here, seeing that the cargoes offering are as a rule limited, and these gratuities figure up a larger proportion of the freight earned than at other ports where cargoes are of more importance.

Population, and Industries.

This town, as per last census, has a population of about 10,000, almost entirely occupied in agricultural pursuits. Peasant proprietorship being the rule here, the soil is very much subdivided and well laboured. This, no doubt, helps the farming class to resist the bad times, as having no rent to pay, all the

land produces is available for taxes and family expenses. Wages for agricultural labourers average 1*s.* for men and 7½*d.* for females per diem; slightly higher for those employed at the stores packing fruit where 1*s.* 6*d.* and 10*d.* are paid. The fruit season, however, only lasts some 3 months.

Public health is satisfactory, the death-rate not averaging over 19 per 1,000. This must be attributed to the fact that the town is built on a slight elevation and hard subsoil, producing a natural drainage without filtration, beneficial to health.

The deplorable state of business generally has caused an increase in emigration to the French provinces in the north of Africa, where the hard-working, frugal, and sober labourers from this district find plenty of work at, to them, good wages. 917 persons took passage there in a small Spanish steamer doing this trade during the past year.

Public Works.

None of any importance have been initiated during the past year. The semaphore on Cape San Antonio, 1½ miles to the north of this port, which has been building for the past few years is now near completion, and it is reported will be inaugurated during the month of March proximo. This will be found of great service by the vessels navigating this part of the Mediterranean which take the Cape as one of their bearings.

The proposed steam tramway to Denia, passing through the villages of Gata, Pedreguer, and Ondara (the very centre of the raisin district), is still in project, but no work has been done on it with the exception of an edifice in Denia, commonly reported to be intended for the station. When constructed it will greatly assist the development of several towns at present suffering from bad means of communication.

Valencia, Cullera, and Burriana.

General trade.

General trade has been depressed, owing in a great measure to the cessation of the enormous exportation of wine to France, and consequent depreciation in price, with no outlook for the disposal of an over-productive crop. The high rate of exchange has greatly checked the importation of goods from foreign countries.

Shipping.

The rice, orange, and onion crops yielded increased quantities and profitable returns to the growers.

Shipping.

	Number of Vessels.	Tons.	Crews.
British vessels entered.. ..	356	270,777	6,890
Foreign vessels entered (exclusive of Spanish)	385	252,704	6,624
Total	741	523,481	13,514

Coal and patent fuel.

	Quantity.	
	Coal.	Patent Fuel.
	Tons.	Tons.
In British vessels from Great Britain	38,876	14,583
In foreign vessels from Great Britain	8,549	3,750
In foreign vessels from Antwerp..	..	13,310
Total	47,425	31,643

Chemicals.

	Quantity.		
	Sulphate of Ammonia.	Superphosphate.	Superphosphate of Lime.
	Tons.	Tons.	Tons.
In British vessels from Great Britain	4,595	22	..
In foreign vessels from Great Britain	2,373	204	970
Total	6,968	226	970

Artificial manure.

Importation was checked by local manufactures, as shown by the increase of the importation of chemicals, and the long credits, high rate of exchange, and great competition kept prices of manure down to barely any profit to British makers.

Tin-plates.

I have to call attention to the Bilbao manufacture cutting out Welsh make. The Bilbao B I. and B II. of 14 by 20 (equivalent to Welsh coke) has driven the Welsh out of this market, leaving the Welsh plates limited to the purchase of I C. 28 by 20.

Galvanised iron buckets.

This important trade from Birmingham and Sheffield is now supplanted by Bilbao, which although rougher than the English is cheaper and serves the purpose.

Pig-iron.

Bilbao pig-iron has absolutely driven out English and Scotch. It is similar to Glengarrock, and admits of more scrap.

Phosphate rock.

Two large cargoes were imported direct from Florida for the manufacture of artificial manure.

Exports.

Exports were chiefly of oranges, onions, tomatoes, and melons. No accurate official statistics can be obtained here. I therefore refer to the British custom-house bills of entry.

I beg to hand herewith Annexes A and B of Valencia, Cullera, and Burriana.

RETURN of all Shipping at the Port of Valencia, Spain, during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	12	1,660	344	269,117	356	270,677
Spanish	...	...	...	...	...	...
Russian	12	7,343	2	1,089	14	8,432
Swedish and Norwegian	5	3,070	118	62,723	123	65,793
Danish	...	...	11	8,498	11	8,498
Belgian	...	...	9	12,871	9	12,871
Dutch	...	...	3	1,781	3	1,781
German	...	...	8	4,523	8	4,523
Austro-Hungarian	1	148	12	11,673	13	11,821
French	3	1,181	127	111,118	130	112,299
Italian	61	14,888	4	5,439	65	20,327
Greek	3	968	5	4,906	8	5,874
Portuguese	...	...	1	345	1	345
Total	97	29,198	644	494,283	741	523,481

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	12	1,660	346	272,207	358	273,867
Spanish	...	...	...	...	...	...
Russian	11	5,997	2	1,489	13	7,486
Swedish and Norwegian	5	3,069	121	65,721	126	68,790
Danish	...	...	11	8,498	11	8,498
Belgian	...	...	9	12,871	9	12,871
Dutch	...	...	3	1,781	3	1,781
German	...	...	8	4,523	8	4,523
Austro-Hungarian	1	148	12	11,673	13	11,821
French	3	1,181	127	111,118	130	112,299
Italian	61	15,332	4	5,439	65	20,771
Greek	3	968	5	4,906	8	5,874
Portuguese	...	...	1	345	1	345
Total	96	28,645	649	506,911	745	535,556

RETURN of Principal Articles of Export from Valencia during the Year 1893.

Articles.		Quantity.	Value.
			£
Oranges	Cases	1,140,000	400,000
Onions	„	400,000	140,000
Melons	„	24,000	6,000
Tomatoes	„	32,000	11,000
Pomegranates	„	7,500	2,000
Tiger nuts	Bags	6,200	5,000
Total	..	..	564,000

RETURN of Principal Articles of Import to Valencia during the Year 1893.

Articles.		Quantity.	Value.
			£
Steam coals	Tons	18,000	18,900
Gas coals	„	20.876	17,700
Patent fuel	„	14,583	8,020
Coal dust	„	100	70
Coke	„	116	174
Artificial manure	„	3,640	31,850
Sulphate of ammonia	„	4,595	63,180
Superphosphates	„	22	176
Jute yarn	Bales	233	3,960
Skins	„	131	130
Iron tubes	Tons	993	6,453
Iron bars	„	217	651
Cement	Casks	500	300
Wire	Packages ..	230	172
Caustic soda	Casks	55	1,075
	Drums ..	160	
Cod-fish	Cwts.	47,130	38,800
China clay	Tons	8	40
Flax	Bales	44	660
Tin	Packages ..	20	95
Rails	Tons	846	4,500
Locomotives	..	4	5,484
Railway carriages	..	15	3,300
Total	..	..	205,690

RETURN of British and Foreign Shipping at the Port of Valencia during the Year 1893.

ENTERED.

Nationality.	With Cargoes.			In Ballast.			Total.		
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.
British	98	52,899	1,532	258	217,878	5,358	356	270,777	6,890
Spanish	..	..	..	..	..	..	..	..	..
Russian	11	6,870	143	3	1,532	49	14	8,402	192
Swedish and Norwegian	106	57,288	1,445	17	8,505	238	123	65,793	1,683
Danish	1	296	13	10	8,672	206	11	8,968	219
Belgian	8	12,154	226	1	717	17	9	12,871	243
Dutch	..	..	..	3	..	..	3	..	..
German	3	1,334	42	5	2,989	80	8	4,323	122
Austro-Hungarian ..	11	9,936	242	2	1,885	48	13	11,821	290
French	128	111,214	2,960	2	1,085	50	130	112,299	3,010
Italian	48	13,523	442	17	6,704	210	65	20,227	652
Greek	8	5,874	136	..	..	..	8	5,874	136
Portuguese	1	345	19	..	..	..	1	345	19
Total	423	271,733	7,200	318	251,748	6,314	741	523,481	13,514

RETURN of British and Foreign Shipping at the Port of Valencia during the Year 1893—continued.

CLEARED.

Nationality.	With Cargoes.			In Ballast.			Total.		
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.
British	259	213,843	5,331	99	60,024	1,607	358	273,867	6,938
Spanish	..	..	..	..	..	..	..	..	..
Russian	2	1,089	39	11	5,997	132	13	7,086	171
Swedish and Norwegian	101	54,749	1,440	25	14,041	333	126	68,790	1,773
Danish	..	..	..	11	8,968	219	11	8,968	219
Belgian	8	12,154	226	1	717	17	9	12,871	243
Dutch	3	1,781	58	..	..	..	3	1,781	58
German	6	3,460	94	2	863	28	8	4,323	122
Austro-Hungarian ..	4	4,072	100	9	7,749	187	13	11,821	287
French	126	110,070	2,955	4	2,169	55	130	112,239	3,010
Italian	13	3,908	135	52	16,453	521	65	20,361	656
Greek	..	..	..	8	5,874	136	8	5,874	136
Portuguese	1	345	19	..	..	..	1	345	19
Total	523	405,471	10,397	222	122,855	3,235	745	528,326	13,632

RETURN of British and Foreign Shipping at Cullera, Spain, during the Year 1893.

ENTERED.

Nationality.	With Cargoes.			In Ballast.			Total.		
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.
British	6	3,409	95	2	1,715	41	8	5,124	136
Spanish	4	2,191	90	..	..	..	4	2,191	90
Swedish	..	..	..	2	692	27	2	692	27
Norwegian	4	1,438	56	..	..	..	4	1,438	56
Total	14	7,038	241	4	2,407	68	18	9,445	309

CLEARED.

Nationality.	With Cargoes.			In Ballast.			Total.		
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.
British	2	1,715	41	6	3,409	95	8	5,124	136
Spanish	..	..	..	4	2,191	90	4	2,191	90
Swedish	2	692	27	..	..	..	2	692	27
Norwegian	..	..	..	4	1,438	56	4	1,438	56
Total	4	2,407	68	14	7,038	241	18	9,445	309

RETURN of all Shipping at Cullera, Spain, during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	18	9,445	18	9,445
Spanish	1	110	3	2,081	4	2,191
Swedish	...	...	2	692	2	692
Norwegian	...	...	4	1,438	4	1,438
Total	1	110	27	13,656	28	13,766

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	18	9,445	18	9,445
Spanish	1	110	3	2,081	4	2,191
Swedish	...	...	2	692	2	692
Norwegian	...	...	4	1,438	4	1,438
Total	1	110	27	13,656	28	13,766

RETURN of Principal Articles of Export from Cullera during the Year 1893.

Articles.	Quantity.	Value.
	Cases.	£
Oranges	3,912	1,600

RETURN of Principal Articles of Import to Cullera during the Year 1893.

Articles.	Quantity.	Value.
	Tons.	£
Artificial manure	4,915	43,000
Superphosphate	136	1,100

RETURN of British and Foreign Shipping at Burriana, Moncofar, and Castellon during the Year 1893.

ENTERED.

Nationality.	With Cargoes.			In Ballast or Transit.			Total.		
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	Number of Vessels	Tons.	Crews.
British	1	871	21	139	103,472	2,820	140	104,343	2,841
Spanish	..	..	..	51	36,340	1,171	51	36,340	1,171
Swedish	..	..	..	9	4,437	138	9	4,437	138
Norwegian	..	..	..	16	7,952	136	16	7,952	136
French	..	..	..	4	5,315	100	4	5,315	100
Russian	..	..	..	2	1,184	32	2	1,184	32
Dutch	..	..	..	2	1,617	45	2	1,617	45
Danish	..	..	..	1	949	24	1	949	24
German	..	..	..	2	963	29	2	963	29
Belgian	..	..	..	1	719	17	1	719	17
Total	1	871	21	227	162,898	4,512	228	163,769	4,533

RETURN of British and Foreign Shipping at Burriana, Moncofar, and Castellon during the Year 1893—continued.

CLEARED.

Nationality.	With Cargoes.			In Ballast or Transit.			Total.		
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.
British	139	103,472	2,820	1	871	21	140	104,343	2,841
Spanish	51	36,340	1,171	..	..	..	51	36,340	1,171
Swedish	9	4,437	138	..	..	..	9	4,437	138
Norwegian	16	7,952	136	..	..	..	16	7,952	136
French	4	5,315	100	..	..	..	4	5,315	100
Russian	2	1,134	32	..	..	..	2	1,134	32
Dutch	2	1,617	45	..	..	..	2	1,617	45
German	2	963	29	..	..	..	2	963	29
Belgian	1	719	17	..	..	..	1	719	17
Danish	1	949	24	..	..	..	1	949	24
Total	227	162,898	4,512	1	871	21	228	163,769	4,533

RETURN of all Shipping at Burriana, Moncofar, and Castellon, Spain, during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	140	104,343	140	104,343
Spanish	...	...	51	36,340	51	36,340
Swedish	1	172	8	4,265	9	4,437
Norwegian	...	...	16	7,962	16	7,962
French	...	...	4	5,315	4	5,315
Russian	1	443	1	691	2	1,134
Dutch	...	...	2	1,617	2	1,617
Danish	...	...	1	949	1	949
German	...	...	2	963	2	963
Belgian	...	...	1	719	1	719
Total	2	615	226	163,154	228	163,769

CLEARED

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	140	104,343	140	104,343
Spanish	...	...	51	36,340	51	36,340
Swedish	1	172	8	4,265	9	4,437
Norwegian	...	...	16	7,962	16	7,962
French	...	...	4	5,315	4	5,315
Russian	1	443	1	691	2	1,134
Dutch	...	...	2	1,617	2	1,617
Danish	...	...	1	949	1	949
German	...	...	2	963	2	963
Belgian	...	...	1	719	1	719
Total	2	615	226	163,154	228	163,769

RETURN of Principal Articles of Export from Burriana District during the Year 1893.

Articles.		Quantity.	Value.
			£
Oranges	Cases	490,000	196,000
Locust beans	Tons	325	1,000

RETURN of Principal Articles of Import to Burriana District during the Year 1893.

Articles.	Quantity.	Value.
	Tons	£
Gas coals	1,624	1,490

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1894.

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SWEDEN.

REPORT FOR THE YEAR 1893

ON THE

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REFERENCE TO PREVIOUS REPORT, Annual Series No. 1256.

Presented to both Houses of Parliament by Command of Her Majesty,
APRIL, 1894.

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SWEDEN.

STOCKHOLM.

Consul Constable to the Earl of Kimberley.

My Lord, *Stockholm, March* 6, 1894.

I HAVE the honour to transmit to your Lordship herewith my Report on the Trade and Commerce of Stockholm and of the Eastern Coast of Sweden for the year 1893.

I have, &c.

(Signed) M. S. CONSTABLE.

Report on the Trade and Commerce of Stockholm and of the Eastern Coast of Sweden for the Year 1893.

ABSTRACT of Contents.

	Page
Stockholm—	
Shipping and navigation	2
Freights	2
Imports	3, 7, 10
Exports	3, 9, 12
Emigration	4
Customs	5
Public works	5, 6
Harbours	6
Table of imports	7, 10
,, exports	9, 12
Sundsvall—	
Shipping	13, 15
Exports	13, 14
Imports	14, 17
Customs	14
Gefle—	
Exports	15, 17, 19
Imports	17, 18, 19
Shipping	17, 18

ABSTRACT of Contents—continued.

	Page
Hernösand—	
Shipping	19, 21
Customs	19
Exports	19, 20
Imports	19, 20
Oscarshamn	
Imports	21, 22
Exports	21, 22
Freights	22
Shipping	22
Customs'	23
Söderhamn—	
Imports	23
Exports	23
Shipping	24
Kalmar—	
Imports	24, 25
Exports	25
Shipping	25
Gotland—	
Imports	26
Exports	26
Shipping	27

Shipping and navigation.

The winter of 1892–93 was the most severe of any experienced in Stockholm for many years, and the navigation of the port was consequently much interfered with throughout the winter. After January 15 it was entirely closed, and remained so until April 3. The shipping season, therefore, was unusually late in commencing.

The total number of ships that entered the port of Stockholm from abroad was 1,664, with an aggregate tonnage of 698,857.

Of these, 359, with a tonnage of 289,936, arrived from ports in Great Britain.

The total number of British vessels visiting the port of Stockholm was 220, with a tonnage of 165,537.

Compared with 1892 there was, therefore, an increase in the British tonnage of 3 vessels, and 11,376 tons.

These figures are more satisfactory than has been the case for several years past, and it may therefore be hoped that the decline in British shipping with the port of Stockholm, consequent upon the protective tariff of 1888, and probably also upon the generally prevailing depression, may at length have ceased, and that even a certain improvement may take place during the ensuing year.

Freights.

The freight market opened dull, but improved as the summer advanced, until by July fairly remunerative rates were obtainable. The homeward freights continued to improve throughout the autumn, but the outward market was very unfavourably affected by the coal strikes in England, from the effects of which it has not yet recovered.

The steady tendency to replace the smaller class of cargo steamers visiting the Baltic by vessels of greater size and improved efficiency exerts a depressing effect on the freight

market, and one which may be expected to continue. Such vessels are able to accept lower rates of freight than the smaller and older steamers, and their competition is consequently severely felt.

Trade and commerce. Imports.

The import trade of Stockholm for 1893 was on the whole well maintained, the principal articles showing only slight variations from the figures of the preceding year.

Of the staple articles of food, herrings show a falling-off, whereas cereals, especially wheat and rye, were imported in larger quantities. This circumstance tends to show that easier circumstances prevailed among the Stockholm working-classes, since, when wages are low, or prices high relatively to them, the demand is rather for the cheaper article of food.

The import of iron shows a considerable falling-off in nearly every department. The protective tariff, and the increased output of pig-iron in Sweden during the last year, together with the high prices of coal, are quite sufficient to account for this.

Notwithstanding the high prices of coal during the continuance of the English coal strike the Stockholm importation shows only a slight decline from the figures of the previous year.

Exports. Iron and steel.

The year 1893 was an unfavourable one for the Swedish iron industry, the export of nearly every description of iron and steel goods, with the exception of pig-iron, showing a decrease. Pig-iron was shipped to a larger extent than was the case during the preceding year, but the prices obtained were not good. The outlook in this market, however, is now better in consequence of the resolution adopted by the Swedish Ironmasters' Association in the beginning of last year to diminish the out-put of Swedish pig-iron by 10 per cent. This resolution has been acted on, with the result that stocks are reduced and prices now fairly maintained.

The following table shows the production of iron in Sweden during the first 9 months of 1893, compared with a similar period for 1892:—

Description	First Nine Months of 1892.	First Nine Months of 1893.	+ Increase, − Decrease, in 1893.
	Tons.	Tons.	Tons.
Pig-iron	344,680	317,170	− 27,510
Bloom-iron	164,313	161,071	− 3,242
Bessemer ingots	63,441	62,662	− 779
Siemen's Martin ingots ..	56,682	60,352	+ 3,670

The following figures serve to show to what extent the low prices are resulting in a diminished output.

At the end of the December quarter of the year 1892, 89 furnaces, 335 forges, 21 Bessemer converters, 24 Martin con-

verters were in operation. For the corresponding period of the year 1893 the numbers were: 110 furnaces, 370 forges, 21 Bessemer converters, and 21 Martin converters.

The exportation of iron ore increased very largely during the year, owing to the opening up of the Gellivara mining district. 447,431 tons were shipped during the first 11 months, whereas the quantities exported during the corresponding periods for the years 1892–91 were 298,336 tons and 159,467 tons respectively. This large increase in production and exportation has, however, been attended with a heavy fall of prices. Before the opening of the Gellivara mines, ore of similar quality with that produced from them sold for prices in some instances 50 per cent. higher than those now obtainable. It is anticipated that a still more considerable increase in the output and exportation of iron ore will take place in the course of the present year. Charter parties for the shipment and delivery of more than 500,000 tons of ore are already signed, for the most part by Norwegian shipowners, so that it is unlikely that the total export will fall short of 600,000 tons.

In the department of iron working an important discovery has lately been made by the well-known Swedish engineer, Herr de Laval, inventor of the cream separator, this gentleman having patented a method for smelting iron ore by means of a novel application of electricity. The first experiment on a large scale is to be made at Trollhättan, where one of the principal waterfalls has been leased for the generation of the electricity required.

The discovery, in consequence of the high reputation of Herr de Laval, is being much discussed here, and some of the newspapers already speak of it as likely to effect a revolution in the Swedish iron industry. If the success is as great as Herr de Laval anticipates, the many waterfalls existing in the country could, it is maintained, be turned to good account.

Wood. The year under review was very favourable for the timber exporters over the whole of the eastern coast of Sweden. The policy of the Association of Swedish and Norwegian Saw Mill Owners in reducing the output has been attended with full success. Stocks are low, and prices well maintained. At a meeting of the association which took place at Christiania, in February of the present year, it was resolved that the same prices for wood goods should be maintained as those fixed at the meeting of the previous year.

Oats. The exportation of oats from Sweden was very large, the figures being 4,018 cwts., as compared with 2,051 cwts. for the previous year. The severity of the winter 1892–93, and the prolonged closing by ice of the Russian ports will partly explain this considerable increase.

Emigration. The emigration of Swedes to America continues to increase year by year, notwithstanding the increased difficulty of earning a livelihood, and the commercial depression at present prevailing there. During 1893, 26,326 persons sailed for America from the port of Gothenburg alone.

The revenue collected from the customs duties shows a falling-off of more than 10,000*l.* from the figures of the previous year. The lighthouse dues, on the other hand, show an increase of 5,553*l.* Customs.

The following statement shows the effects of the protective tariff of 1888 on the revenues derived from customs duties and light dues for the Kingdom of Sweden.

Customs Duties.

Under Old Tariff.

Year.	Amount.
	£
1885..	1,840,177
1886..	1,790,751
1887..	1,705,799

Under New Tariff.

Year.	Amount.
	£
1888..	2,095,703
1889..	2,359,775
1890..	2,370,840
1891..	2,111,808
1892..	2,072,096
1893..	2,061,584

Light Dues.

Under Old Tariff.

Year.	Amount.
	£
1885..	75,028
1886..	72,626
1887..	73,436

Under New Tariff.

Year.	Amount.
	£
1888..	80,479
1889..	83,439
1890..	83,678
1891..	88,661
1892..	88,613
1893..	94,166

On December 6 of last year the last rail of the Jörn-Boden railway line was laid down, an event which marks the com- Public works. Railways.

pletion of the scheme of railway construction on which the Swedish Government has been engaged since the year 1855. Unbroken railway communication now exists between Malmö in the south and Gellivara in Swedish Lapland.

The revenue from the State railways maintains a steady rate of increase. For the year 1893 it amounted to 1,271,509*l.*, an advance of more than 27,777*l.* on the previous year.

The mileage of the State railways was increased during the year by 72 kiloms., bringing up the total to 2,814 kiloms.

Telephones. The comprehensive scheme recently embarked upon by the Swedish Government for the urban and interurban extension of the State telephones made great progress during the year 1893. Direct telephone communication was established between Stockholm and Christiania, and also between Stockholm and Copenhagen. The first conversation over this latter line was conducted by their Majesties King Oscar of Sweden, and King Christian of Denmark, other members of the two royal families being present on the occasion.

During the course of the year many of the lines belonging to private companies were purchased on account of the Government. It is calculated that, reckoning purchase and construction together, the State system was connected with 100 new stations in the different towns and villages of the kingdom.

The total expenditure for 1893 amounted to 55,500*l.*

It is not expected that during the present year the development will be quite so rapid as it has been for the years 1891, 1892, and 1893, as the grant for 1894 only amounted to 41,600*l.* Interurban connections will, however, be established between Norrköping and Katrineholm, Gnesta and Flen, Hernösand and Solleftea, and various towns and villages in the province of Skåne.

The efficiency of the staff of employés maintained at the Central State Telephone Station may be estimated from the fact that the average interval between the ringing of a subscriber's bell and the establishment of the connection during the month of November last was only $6\frac{1}{10}$ seconds.

Harbours. The scheme for constructing a canal between Baggensfjärd and Lännerstasundet, which would have the effect, if carried out, of lessening the distance between the port of Stockholm and the open Baltic for vessels coming from the south by about 22 English miles, is still under the consideration of the authorities. The petition for a Government grant towards the necessary expenditure (estimated at 72,222*l.*) was handed in at the end of January, 1893. Since then the draft scheme has been submitted to several administrative departments of the Swedish Government to be examined and reported upon, and although it has been criticised in many of its details it has, on the whole, been favourably considered.

The state of the entrance to the harbour of Lulea, though still far from satisfactory, is now considerably improved. The channel will be practicable during the forthcoming shipping season for vessels drawing 23 feet of water.

RETURN of Principal Articles of Import to Stockholm during the Years 1892–93.

Articles.		Quantity.	
		1892.	1893.
Asphalte	Cwts.	15,372	13,833
Almonds	„	2,788	3,489
Brandy in casks	Gallons	17,577	21,318
Arrak „	„	91,315	89,766
Rum	„	1,829	1,591
Cognac	„	104,178	46,574
„ bottled	„	8,595	8,109
Butter	Cwts.	9,882	10,803
Cement	„	1,215	354
Cheese	„	..	2,922
Coals and coke	Cubic feet	17,175,559	16,663,425
Coffee	Cwts.	93,638	84,860
Colours	„	11,743	11,283
Copper	„	16,164	20,630
Cotton	„	13,004	13,022
Cork wood	„	23,083	23,358
Fish—			
Herrings	„	148,513	111,807
Cod	„	7,028	8,528
Glass—			
Window	„	2,442	2,672
Mirror	„	1,722	2,055
Grain—			
Wheat	„	782,003	862,626
Barley	„	33,498	18,694
Rye	„	552,531	809,807
Maize	„	18,589	34,008
Rice	„	33,109	36,490
Hemp	„	16,281	7,166
Hides—			
Not fur	„	3,433	3,015
Prepared	„	9,640	16,806
Hops	„	2,526	2,578
Iron—			
Pig	„	153,718	85,853
Bar	„	51,338	43,140
Rails	„	86,821	40,424
Sheet	„	29,502	18,509
Lead	„	..	10,397
Liqueur	Gallons	9,810	4,360
Molasses	Cwts.	..	52,339
Meat	„	7,207	6,036
Manure	„	242,650	294,256
Oils—			
Linseed	„	7,524	287
Other fatty oils in casks	„	41,491	41,834
„ „ other vessels	„	665	683
Mineral, crude	„	17,406	36,217
Refined	„	251,972	366,142
Oil-cakes	„	119,174	121,817
Oranges	„	6,173	6,038
Pepper	„	1,535	1,908
Pork	„	22,536	18,052
Potatoes	„	33,990	27,103
Potashes	„	14,843	16,904
Raisins	„	5,502	5,376

RETURN of Principal Articles of Import to Stockholm during the Years 1892-93—continued.

Articles.		Quantity	
		1892	1893.
Rope	Cwts.	2,136	1,517
Rye meal	„	20,754	27,529
Salt	Cubic feet ..	612,863	632,070
Seeds	Cwts.	65,005	84,902
Shoddy	„	1,145	567
Soda	„	18,521	31,433
Sugar—			
Refined	„	37,531	25,056
Raw	„	146,200	137,708
Tallow	„	22,204	20,277
Tar	„	..	40,801
Tea	„	754	837
Tin	„	2,919	3,728
Tobacco	„	20,470	20,743
Wheaten flour	„	120,000	181,948
Wine—			
In casks	„ ..	48,229	4,744
Bottled	Gallons ..	89,991	13,573
Wool	Cwts.	2,433	1,761
Zinc	„	..	9,913

RETURN of Principal Articles of Export from Stockholm during the Years 1892–93.

Articles.		Quantity.	
		1892.	1893.
Bar iron	Cwts.	956,500	873,271
„ ends	„	..	24,304
Manufactured iron	„	5,503	3,431
Iron wire, in coils	„	8,056	16,635
Sheet iron	„	43,738	40,130
Scrap and bloom iron	„	52,892	58,262
Pig iron	„	228,952	196,121
Steel	„	63,209	57,942
„ rails, old	„	171,013	27,664
Lead and lead ore	„	51,792	78,360
Oats	„	506,129	791,802
Hides and skins	„	5,691	7,877
Clover and grass seeds	„	3,078	2,693
Hay	„	..	6,745
Deals and battens	Standards	12,859	12,199
Matches	Cwts.	6,546	4,700
Carpentry	Value £	28,483	39,110
Wood-pulp	Cwts.	33,123	5,962
Implements and machinery	Value £	65,094	83,027
Punch	Gallons	5,146	7,953
Brandy and spirit	„	3,689	13,466
Rags	Cwts.	8,550	9,752
Paper	„	..	13,250
Tallow	„	1,881	..
Oil-cakes	„	6,650	8,360
Zinc ore	„	73,910	41,144
China	„	6,577	9,021
Feldspath	„	42,294	45,970
Nails	„	5,515	5,615
Tar	„	18,935	23,525

RETURN of Principal Articles of Import into Sweden during the Years 1892–93.

Articles.		Quantity.	
		1892.	1893.
Cotton, dyed and undyed ..	Cwts.	253,308	215,365
Brandy and spirits in casks from barley, potatoes, &c. ..	Gallons ..	51,040	54,560
Brandy and spirits in casks from rice, arrak	„ ..	136,840	158,840
Brandy and spirits in casks from sugar, rum	„ ..	9,680	11,352
Brandy and spirits in casks from grapes, cognac	„ ..	112,200	187,880
Brandy and spirits in other vessels, all kinds	„ ..	22,880	20,680
Fish, salted and pickled, dried or smoked, herring	Cwts.	659,794	689,092
Fish, salted and pickled, dried or smoked, cod	„	57,665	56,829
Pork	„	139,935	67,944
Manure, all sorts, not specified in tariff	„	1,780,889	2,006,685
Hides and skins, not furs, untanned, all kinds	„	51,718	43,681
Coffee	„	305,615	328,529
Live stock—			
Horses	Head	820	910
Cattle	„	2,600	1,730
Sheep	„	400	400
Pigs	„	1,920	1,470
Meat	Cwts.	17,081	14,972
Machines, tools and implements (not steam)	Value £	566,277	320,611
Iron—			
Steel, pig and ballast iron ..	Cwts.	..	393,091
Rails	„	..	[illegible]
Bar iron	„	..	33,117
Oleomargarine	„	456	112
Oils, mineral, distilled by dry process, rectified	„	763,857	879,092
Cheese, all kinds	„	3,705	5,[illegible]92
Paper, all kinds	„	60,287	58,178
Wood-pulp, chemically prepared, dry	„	306	1,805
Wood-pulp, chemically prepared, undried	„	190	..
Salt, unrefined, rock salt and salt for cooking	Cubic feet ..	3,381,000	3,[illegible]21,500
Butter, natural	Cwts.	16,773	15,628
„ artificial	„	13,509	12,464
Sugar, refined, all kinds ..	„	125,685	82,878
„ unrefined	„	441,951	524,172
Molasses	„	190,665	239,419
Grain, unground—			
Wheat	„	2,088,385	2,275,022
Barley	„	180,348	119,054
Maize	„	..	170,335
Rye	„	1,183,643	1,536,969
Grain, ground—			
Wheatmeal	„	424,099	659,775
Rye-meal	„	212,242	359,157

RETURN of Principal Articles of Import into Sweden during the Years 1892–93—continued.

Articles.		Quantity.	
		1892.	1893.
Coals, coal dust, and coke ..	Cubic feet ..	79,496,000	78,770,200
Tallow	Cwts.	49,495	39,501
Tar	„	21,204	42,028
Tobacco, unprepared, leaf and stalk	„	81,358	70,642
Wool, dyed and undyed ..	„	41,857	46,778
Wine, in barrels, all kinds ..	„	35,112	22,268
„ in other vessels	Gallons ..	92,840	40,480
Textiles—			
Silk, of all kinds	Cwts.	1,825	1,124
Cotton, „	„	24,130	28,234
Wool, „	„	43,263	49,229
Linen and hemp	„	7,429	7,315

Return of Principal Articles of Export from Sweden during the Years 1892–93.

Articles.		Quantity. 1892.	1893
Brandy and spirit, in casks, from grain, potatoes, &c.	Gallons ..	331,760	26,400
Fish—			
Fresh, all kinds	Cwts. ..	1,701,792	1,469,517
Salted or preserved, dry or smoked, herrings	„ ..	594,377	558,391
All other kinds	„ ..	12,730	14,687
Bacon	„ ..	127,737	125,267
Hides and skins, not furs, unprepared, all kinds	„ ..	30,932	34,922
Live stock—			
Horses	Head ..	2,850	2,250
Cattle	„ ..	19,200	12,600
Sheep	„ ..	19,100	320
Pigs	„ ..	8,900	1,880
Meat	Cwts. ..	8,189	11,858
Machines, tools and implements, not steam	Value £	163,666	195,111
Iron and steel—			
Pig and ballast iron	Cwts. ..	1,093,241	1,136,789
Ingots	„ ..	88,426	80,693
Bloom and rough bars	„ ..	176,662	184,737
Bars	„ ..	3,399,062	3,085,600
Pieces of bars	„ ..	50,141	56,620
Iron wire in coils	„ ..	87,685	32,11
Sheets	„ ..	61,674	63,82
Drawn wire	„ ..	..	14,307
Nails of 45 millims. length or more	„ ..	53,580	50,768
Copper, raw or refined	„ ..	3,876	1,463
Ore, iron	„ ..	6,081,349	9,196,380
„ zinc	„ ..	558,752	508,668
Cheese, all kinds	„ ..	3,591	2,812
Paper, all kinds	„ ..	400,254	351,880
Wood-pulp—			
Chemically prepared, dry	„ ..	554,363	700,511
„ undried	„ ..	234,992	258,191
Machine pressed, dry	„ ..	529,150	529,511
„ „ undried	„ ..	397,347	394,839
Butter, natural	„ ..	334,441	381,149
„ artificial	„ ..	488	1,535
Grain, unground—			
Oats	„ ..	2,034,292	4,018,272
Wheat	„ ..	750	668
Barley	„ ..	88,488	90 364
Rye	„ ..	2,318	6,099
Grain, ground—			
Wheatmeal	„ ..	28,595	6,251
Ryemeal	„ ..	5,643	1,235
Tar	„ ..	122,170	101,422
Wood—			
Not worked up, hewn or sawn of Scotch fir or spruce, logs and masts of 25 centims. or more at the small end	Standards ..	46,137	35,622
Square timber and square balks	„ ..	69,742	66,309

RETURN of Principal Articles of Export from Sweden during the Years 1892–93—continued.

Articles.		Quantity.	
		1892.	1893.
Wood—continued—			
Pit props	Standards	..	152,360
Cellulose props	„	..	3,890
Deals and battens	„	528,755	542,274
Boards	„	266,523	290,558
Planed, of joined boards	„	49,570	54,506
Matches	Cwts.	291,821	250,819
Wool, dyed or undyed	„	231	423
Textiles—			
Silk, of all kinds	„	53	47
Cotton, „	„	15,067	13,908
Wool, „	„	4,883	4,598
Linen or hemp	„	600	570

SUNDSVALL.

Mr. Vice-Consul Bredenberg reports as follows :—

Shipping. The number of ships that entered this port from abroad during 1893 was 841, with an aggregate tonnage of 364,066 tons, as against 910 of 395,605 tons in 1892. Of these 331 were steamers, with an aggregate tonnage of 192,714, and 510 were sailing vessels, with an aggregate tonnage of 171,352 tons; 211 vessels arrived with cargoes, and the remainder were in ballast; 160 vessels, with a tonnage of 75,375, arrived from ports in Great Britain.

The total number of ships cleared for foreign ports was 1,251, with a tonnage of 609,752, as against 1,293, with a tonnage of 580,413 in 1892, showing a falling-off in number of 42 vessels, but an increase in tonnage of 29,339 tons. Of the said 1,251 vessels, 1,175 of 590,641 tons had cargoes, and the remainder were in ballast; 462 vessels, with a tonnage of 226,755, cleared for Great Britain or its colonies, the country next in order being France, with 210 vessels, and a tonnage of 124,121 tons.

British shipping. The number of British vessels visiting the port was 168, with a tonnage of 158,397, as against 181, with a tonnage of 179,965 in 1892, showing a decrease of 13 vessels, and 21,568 tons, whilst in 1891 there were 250 vessels, with a tonnage of 231,083, the decrease from 1891 to 1893 being 82 vessels, with a tonnage of 72,686 tons.

Shipping and export. Though the total amount of shipping shows an increase of 28,061 tons compared with the previous year, the export of wood goods and iron shows a decrease of 8,430 standards and 1,500 tons respectively. This falling-off was caused by restricted output agreed upon among the wood exporters in 1891 and 1892 in the case of timber, and for the iron by the unsatisfactory state of the English market.

Imports.

The imports show an increase in ryemeal and wheaten flour of about 3,000 tons each, also in coffee of 4,500 cwts., and treacle and molasses of 9,650 cwts., whilst butter, beef, and meat, bacon, and pork, and also sugar show a decrease, the last article to the extent of 12,239 cwts., caused, doubtless, by increased native production.

Customs.

The customs duties continued to show a falling-off. They have declined steadily since 1889, the year subsequent to the introduction of the protective tariff. The revenue from them collected last year amounted to 80,736*l.*, whereas in 1889 it stood at 113,307*l.*

RETURN of Principal Articles of Export from Sundsvall during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Fish—					
Herring	Cwts.	7,065	...	8,217	...
Cod	"	6,503	...	7,174	...
Meat and pork	"	351	...	481	...
Iron—					
Pig	Tons	3,274	...	5,023	...
Bloom	"	713	...	173	...
Bar	"	421	...	709	...
Wood—					
Deals and battens	Standards	101,852	...	101,556	...
Boards	"	56,176	...	49,979	...
Planed boards	"	14,638	...	10,457	...
Deal and board ends	Fathoms	16,924	...	21,257	...
Round timber and spars	Standards	25,742	...	44,[illegible]	...
Square timber	"	17,432	...	18,[illegible]7	...
Pitprops	"	5,562	...	2,247	...
Other kinds	"	1,721	...	1,069	...
Joinery and turnery			2,377	...	2,983
Matches	Cwts.	872	...	...	...

RETURN of Principal Articles of Import to Sundsvall during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Butter	Cwts.	1,382	...	1,932	...
Beef and meat	"	2,405	...	3,[illegible]	...
Bacon and pork	"	9,039	...	14,146	...
Coffee	"	26,[illegible]81	...	22,146	...
Sugar, refined	"	25,965	...	48,[illegible]4	...
Treacle and syrup	"	29,[illegible]85	...	19,429	...
Grain—					
Rye	"	749	...	[illegible]	...
Ryemeal	"	136,[illegible]37	...	77,[illegible]72	...
Wheaten flour	"	90,[illegible]87	...	58,[illegible]97	...
Wine and spirits	Gallons	[illegible],289	...	[illegible]3	...
Salt	Cubic feet	78,[illegible]08	...	84,[illegible]93	...
Coke and coke	"	2[illegible],[illegible]85	...	2[illegible],[illegible]80	...
Oil, mineral, refined	Cwts.	[illegible],[illegible]67	...	[illegible],[illegible]43	...
Manure	"	[illegible],[illegible]17	...	[illegible],[illegible]94	...
Iron	"	1,[illegible]43	...	[illegible]19	...
Woollen goods		[illegible]89	...	[illegible]57	...
Implements and machinery		...	3,923	...	6,792

RETURN of all Shipping at the Port Sundsvall during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	9	2,975·40	159	155,421·99	168	158,397·39
Swedish	371	126,503·39	121	52,355·61	492	178,859·00
Norwegian	190	83,511·68	29	24,724·40	219	108,236·08
German	34	14,110·83	91	56,656·00	125	70,766·83
Danish	74	15,551·84	19	15,642·30	93	31,194·14
Russian and Finnish	56	18,938·24	24	4,029·60	80	22,967·84
Dutch	40	17,688·74	4	3,426·66	44	21,115·40
Spanish	...	...	10	9,928·87	10	9,928·87
Other countries ...	17	3,980·69	2	3,588·11	19	7,568·80
Total	791	283,260·81	459	325,773·54	1,250	609,034·35
,, for the year preceding ...	807	238,991·01	486	341,982·30	1,293	580,973·31

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	9	2,975·40	159	155,421·99	168	158,397·39
Swedish	371	126,792·87	121	52,355·61	492	179,148·48
Norwegian	190	83,511·68	29	24,724·40	219	108,236·08
German	34	14,110·83	91	56,656·00	125	70,766·83
Danish	74	15,551·84	19	15,642·30	93	31,194·14
Russian and Finnish	57	19,366·38	24	4,029·60	81	23,395·98
Dutch	40	17,688·74	4	3,426·66	44	21,115·40
Spanish	...	...	10	9,928·87	10	9,928·87
Other countries ...	17	3,980·69	2	3,588·11	19	7,568·80
Total	792	283,978·43	459	325,773·54	1,251	609,751·97
,, for the year preceding ...	807	238,430·91	486	341,982·30	1,293	580,413·21

GEFLE.

Mr. Vice-Consul Carrick reports as follows:—

Exports. The wood trade.

The export of sawn and planed fir wood, which constitutes the staple article from this port, increased by about 15 per cent. compared with the year 1892. Prices were slightly higher than the preceding year, and the trade was wonderfully steady, neither financial disturbances in Australia or elsewhere, nor strikes in England, having had any appreciable adverse effect. This steadiness, notwithstanding the depression in other staple articles, was, no doubt, due to the renewal of the agreement between the principal saw millers and exporters for the restriction of the "log-get" during the winter 1892-93, and which had proved so efficacious the two preceding seasons.

The Australian market, as anticipated in the report for

1892, was quite demoralised, and business done was but a tithe of that of former years. The demand there still shows few signs of recovery, but the recuperative powers of the colony are great, and I anticipate a revival before the close of 1894 shipping season. The South African market, on the other hand, was very satisfactory, and this was also the case with Great Britain, where the consumption was surprisingly good considering the adverse conditions under which the trade laboured.

Approximately prices for good Gefle productions were as follows, free on board, viz.:—

Description.	Mixed.	Thirds.	Fourths.	Fifths.	Unsorted
	£ s.	£ s.	£ s.	£ s.	£ s.
11-inch redwood deals	13 5	11 5	8 0	7 0	
9-inch ,, ,, ...	12 5	10 5	8 0	7 0	..
7 and 8-inch redwood battens ...	9 0	7 0	5 15	5 0	..
,, boards ...	10 10	8 10	5 10	4 15	..
9-inch whitewood deals	...	...	...	...	6 5
6½, 7 and 8 inch whitewood battens	...	...	...	...	4 15

I may here mention that a well-known exporter has issued a pamphlet which is causing considerable controversy, as it advocates what virtually amounts to an export duty on wood. The author states, what is true enough, that the forests in the north of Sweden are being rapidly depleted, and considers that a compulsory replanting law is urgently required. He proposes that a tax of 1 kronor (1*s.* 1½*d.*) on each shipped St. Petersburg standard of 165 English cubic feet should be levied on the exporters to provide the necessary funds. Although I consider the method of raising the money objectionable, yet I am afraid the Swedish Government will be obliged before long to do something to ensure the more rapid reproduction of forests from denuded areas, as there can be little doubt but that the fellings are much greater than the re-growth of the forests as they are now managed.

The iron and steel trades.

The conditions under which these trades were working during 1893 were very unsatisfactory. Except where the works are largely employed on specialities, such as is the case to a considerable extent with the Sandviken Co., Sandviken, near Gefle, there is very little profit to be made.

The Swedish State Railway management, anxious to free the country, to some extent, from its dependence on Great Britain and Belgium for the supply of steel rails, some years ago persuaded a Swedish firm who have their works near Gefle to undertake this production. The experiment was watched with interest, but although the manufacture is still continued, and the quality of the rails is satisfactory, it is understood that the manufacture would not be remunerative but for the discriminating rates allowed the company in competition with British and Belgian producers.

The wood-pulp trade.

This branch has been further developed during the past year by the extension of the three already existing factories in this district, and the financial result of the season's operations is understood to have been most satisfactory. Extensions are still being proceeded with, but the number of new works in progress in different parts of the country leave room for doubt whether there will not be an over-production of wood-pulp in the near future, and consequent fall in prices.

Imports.

The fluctuations in the imports call for no special comment. The purchases of coffee were considerably heavier than usual, while the imports of grain were one-third less than in 1892, and those of cotton only about one-half of the amount for that year.

Coal and coke.

The quantities of coal and coke handled were well maintained, considering the difficulties thrown in the way of imports by the protracted miners' strike in England. This strike caused considerable loss and inconvenience to importers here, as they had no "strike clause" in their contracts with consumers, while the English colliery owners, on the other hand, had. Importers' arrangements are understood to be undergoing revision in this respect.

Shipping.

The tonnage of British shipping trading to this port increased a little beyond the figures of the preceding year. A larger increase would, in all probability, have taken place, had it not been for the coal strike, which caused many owners to send their vessels to other ports rather than Hull.

Notwithstanding this drawback, the British flag covered a larger foreign-going tonnage than that of any other nationality, not excluding Swedish. The German tonnage is, however, increasing faster than that of any other country.

Shipbuilding has been carried on in a tentative way at one yard, but the long winter and other disadvantages prevent much development of the industry.

Efforts are now being made by the Gefle Corporation to improve and deepen the harbour by the blasting of rocks lying near the fairway, as well as by dredging. An improvement is already visible in this respect, but a greater depth of water is still urgently needed.

Annex I.—RETURN of Principal Articles of Export from Gefle during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£ s. d.		£ s. d.
Wood goods	Standards	142,434	885,986 10 0	124,846	771,062 16 0
Iron and steel	Tons ...	39,076	238,642 15 11	35,747	254,289 19 3
Wood-pulp	,, ...	13,224	55,485 0 0	...	90,207 19 0
Other articles	...	...	11,588 17 6		
Total	...	...	1,191,703 3 5	...	1,115,560 14 3

RETURN of Principal Articles of Import to Gefle during the Years 1893–92.

Articles.		1893.			1892.		
		Quantity.	Value.		Quantity.	Value.	
			£ s. d.			£ s. d.	
Grain, &c.	Tons ...	8,860	73,977 8 5		10,983	109,096 2 11	
Coffee	Cwts. ...	13,447	64,654 19 4		11,303	50,235 4 0	
Pork and beef	,, ...	6,866	15,478 8 3		11,420	21,961 10 11	
Sugar	,, ...	2,303	10,469 17 8		10,648	9,985 9 2	
Wine and spirits	Gallons ...	14,767	8,492 2 0		6,207	2,672 7 0	
Coal and coke	Tons ...	108,214	86,571 10 5		110,236	63,385 14 0	
Cotton	Cwts. ...	7,180	16,244 13 4		14,212	32,372 1 0	
Oils (mineral)	,, ...	49,864	21,154 11 10		50,949	22,308 10 0	
Rice	,, ...	10,448	5,318 16 0		...	...	
Manures (artificial)	Tons ...	3,629	10,243 2 6		...	...	
Hides and skins	Cwts. ...	1,615	4,567 7 9		...	...	
Iron	Tons ...	859	2,001 12 0		...	...	
Tobacco	Cwts. ...	3,398	8,643 16 0		...	...	
Machinery	...	...	4,630 8 11		...	17,358 15 6	
Other articles	...	...	34,290 4 6		...	61,879 3 3	
Total	...	...	364,738 18 11		...	291,254 17 9	

Annex II.—RETURN of all Shipping at Port of Gefle during Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	9	4,[illegible]72	154	149,[illegible]09	163	154,[illegible]81
Swedish	100	2[illegible]3	136	[illegible]	236	[illegible]3
German	29	[illegible]42	66	[illegible]3	95	41,[illegible]35
Norwegian	81	2[illegible]3	20	1[illegible]5	101	4[illegible]6
Danish	26	5,[illegible]28	3	3,[illegible]71	29	[illegible]99
Russian	2	4[illegible]55	1	312·00	3	[illegible]45
Dutch	5	1,464·78	...	...	5	1,464·78
Other countries ...	9	3,[illegible]60	1	1,266·36	10	4,[illegible]96
Total ...	261	83,[illegible]81	381	289,[illegible]32	642	34[illegible]13
,, for the year preceding	280	83,301·34	349	242,947·89	629	[illegible]23

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	8	1,[illegible]16	154	149,[illegible]09	162	[illegible]19
Swedish	167	4,[illegible]92	139	[illegible]42	306	[illegible]34
German	28	[illegible]84	79	[illegible]92	107	[illegible]76
Norwegian	91	34,[illegible]80	31	[illegible]78	122	[illegible]58
Danish	26	[illegible]72	..	1,959·02	31	[illegible]74
Russian	3	[illegible]5	...	...	3	[illegible]5
Dutch	6	1,[illegible]47	...	...	6	[illegible]47
Other countries ...	10	[illegible]75	1	1,266·36	11	[illegible]11
Total ..	339	1[illegible]474·87	409	[illegible]149·39	748	[illegible]46
,, for the year preceding	366	[illegible]31	429	244,566·63	795	[illegible]94

Annex III.—TABLE showing the Exports and Imports of Gefle for the Years 1893–92.

Country.	Imports.		Exports.	
	1893.	1892.	1893.	1892.
	£ s. d.	£ s. d.	£ s. d.	£ s. d.
Great Britain	755,875 0 1	728,404 18 5	142,205 15 10	118,225 5 8
Germany	126,697 12 2	92,007 12 4	74,027 5 9	77,729 18 3
Belgium	87,398 5 0	85,711 15 1	8,081 17 5	6,279 8 0
Holland	34,985 5 0		...	
France	91,264 15 0	62,096 7 9	7,454 5 4	4,380 7 2
Denmark	16,134 12 2	21,812 16 7	32,487 12 2	30,197 14 3
Russia	21,567 3 4	17,113 19 0	22,888 4 3	58,903 15 1
Other countries	57,780 10 8	108,413 5 1	77,593 18 2	95,538 9 4
Total	1,191,703 3 5	1,115,560 14 3	364,738 18 11	391,254 17 9

HERNÖSAND.

Mr. Vice-Consul Burchardt reports as follows :—

Shipping. The British shipping of this district showed a very great increase compared with the previous year, as it was visited during 1893 by 162 vessels, with an aggregate tonnage of 128,476 tons, as against 1892 by 112 vessels, with an aggregate tonnage of 86,236 tons. This is the more striking since the return of all shipping only gives an increase of about 10 per cent. as to tonnage, the increase being due to the favourable state of the wood trade.

Customs. The total sum of customs duties which were collected amounted during 1892 to 12,376*l.*, and 1893 to 11,126*l.*

Exports. The principal articles of export from this port are wood goods, and this trade had a rising market last year, with satisfactory prospects for shippers in 1894. For a number of years the shippers have had very bad times to contend with, in fact, mill owners who in past years have not succeeded in reserving forests of their own by favourable purchases, have not been able to make any profits to speak of at all.

Imports. On the whole the imports of 1893 may be considered equal to those of previous years, although the customs duties collected were then larger by about 10 per cent.

RETURN of Principal Articles of Export from Hernösand District during the Years 1889–93.

Articles.		1889.	1890.	1891.	1892.	1893.
Deals and battens ..	Standards...	116,606	117,812	119,569	100,824	116,176
Boards ...	,, ...	46,639	51,559	59,666	54,703	61,645
Planed boards ...	,, ...	1,047	803	836	1,127	1,521
Deal and board-ends	,, ...	14,191	13,401	16,100	17,035	14,909
Poles and spars ..	,, ...	1,166	856	568	942	1,496
Hewn timber ..	,, ...	11,758	8,990	10,306	13,758	11,183
Mining timber ...	,, ...	2,081	2,147	4,160	8,233	13,260
Staves	,, ...	2,526	2,898	4,066	2,209	5,196
Laths and other kind of wood ..	,, ...	680	1,626	1,225	848	1,968
Wood pulp	Kilos. ...	...	...	...	620,600	1,980,600
Tar	,, ...	...	...	...	...	956,290
Iron	,, ..	2,474,032	3,683,086	3,625,781	2,723,150	2,857,650

RETURN of Principal Articles of Import to Hernösand District during the Years 1893–92.

Articles.		Quantity.		
		1893.	1892.	
Herrings, salted	Kilos... ..	23,650	50,055	
Pork	,, ...	68,512	81,179	
Beef	,, ...	81,280	95,138	
Coffee	,, ...	148,648	132,410	
Oils	,, ...	982,807	545,346	
Cheese	,, ...	489	583	
Wheat flour	,, ...	382,457	383,071	
Rye ,, ...	,, ...	1,352,335	529,294	
Tobacco leaves	,, ...	878	..	
Silk cloth	,, ...	2	29	
Cotton ,, ...	,, ...	583	1,288	
Wool ,, ...	,, ...	1,610	1,913	
Linen ,, ...	,, ...	691	58	
Butter	,, ...	93,511	121,445	
Sugar, refined	,, ...	130,082	127,140	
Syrup	,, ...	136,827	131,927	
Rails	,, ...	5,423,400	8,975,506	
Coals and coke	Hectolitre ..	188,547	102,067	
Salt	,, ..	28,516	22,714	
Wine and spirits	Litre	8,811	6,107	
Machinery .. .. (value)	Kronor ..	4,972	9,617	

RETURN of all Shipping in the Hernösand District during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	2	840·18	125	123,929·29	127	124,769·47
Swedish	157	33,894·34	74	20,390·50	231	54,284·84
German	11	2,941·12	32	20,254·63	43	23,195·75
Norwegian	126	54,551·65	5	3,143·96	131	57,695·61
Danish	71	11,079·82	5	5,396·13	76	16,475·95
Russian (Finnish)	55	14,370·31	1	312·90	56	14,683·21
Other countries ...	35	11,661·39	4	4,051·81	39	15,713·20
Total	457	129,338·81	246	177,479·22	703	306,818·03
,, for the preceding year ...	473	137,536·80	227	144,365·83	700	281,902·63

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	4	1,871·99	213	205,428·78	217	207,300·77
Swedish	351	74,394·64	84	56,898·51	435	131,293·15
German	19	4,246·53	39	25,004·81	58	29,251·34
Norwegian	161	66,389·42	14	10,797·84	175	77,187·26
Danish	82	13,987·30	12	9,862·99	94	23,850·29
Russian (Finnish)	54	13,799·00	...	...	54	13,799·00
Other countries ...	57	19,501·61	8	7,537·22	65	27,038·83
Total	728	194,190·49	370	315,530·15	1,098	509,720·64
,, for the year preceding ...	710	224,582·49	340	235,134·83	1,050	459,717·32

OSCARSHAMN.

Mr. Vice-Consul Wingren reports as follows:—

Imports and exports.

The imports to Oscarshamn during 1893 consisted chiefly of herrings, pork, coffee, coal, tobacco, and salt, while the exports were principally wood goods, granite stone, matches, fresh fish, and oats.

Sawn wood goods are chiefly exported to Germany, and were for 1893 about equal in quantity to the shipments of the previous year. On the other hand the shipments to England, chiefly consisting of colliery timber (pit-props), showed an increase of 11,000 cubic metres as compared with 1892.

Towards the autumn the demand in wood goods improved and fair prices were obtainable, stocks being, in consequence, considerably reduced. Should the output continue to be restricted during the present winter prices will probably rule somewhat better for 1894 shipments.

Freights. The rates of freights were about the same as those for last year, and no improvement is likely to take place owing to the excess of tonnage in the market.

Shipping. The port of Oscarshamn was visited during 1893 by 8 British steamers, of an aggregate tonnage of 5,066 tons net register. Two of these steamers were, however, brought in for repairs owing to damages sustained through casualties.

RETURN of Principal Articles of Import to Oscarshamn during the Years 1892–93.

Articles.		1892		1893	
		Quantity.	Value.	Quantity.	Value.
			£		£
Wine and spirits	[illegible]	[illegible]	...	[illegible]	[illegible]
Herrings, salted	kilos	1,442,[illegible]	...	2,[illegible]	[illegible]
Fish, dry	,,	[illegible]	...	[illegible]	...
Fish, salted	,,	5,[illegible]	...	[illegible]	[illegible]
Matches	,,	2,[illegible]	...	1,[illegible]	[illegible]
Sugar	,,	[illegible]	...	[illegible]	...
Coffee	,,	[illegible]	...	[illegible]	...
Machinery	Value		500		331
Manufactures of iron and steel	Kilos	[illegible]	...	[illegible]	...
Vegetable oils	,,	[illegible]	...	[illegible]	...
Paper	,,	[illegible]	...	[illegible]	...
Salt	,,	[illegible]	...	[illegible]	...
Sugar	,,	[illegible]	...	[illegible]	...
Soap	,,	[illegible]	...	[illegible]	...
Tobacco, manufactured	,,	[illegible]	...	[illegible]	...
Woollen yarn	,,	[illegible]	...	[illegible]	...
Coal and coke	Hectolitres	[illegible]	...	[illegible]	...
Raw cotton	Kilos	[illegible]	...	[illegible]	...
Silk, cotton, woollen, and linen cloths		[illegible]	[illegible]	[illegible]	[illegible]

RETURN of Principal Articles of Export from Oscarshamn during the Years 1892–93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Fish, fresh	Kilos	[illegible]	...	[illegible]	[illegible]
Herrings, salted	,,	[illegible]	...	[illegible]	[illegible]
Oats	,,	[illegible]	...	[illegible]	[illegible]
Granite stone, unpolished	...		4,[illegible]	...	[illegible]
Pulp, mechanically wet	Kilos	[illegible]	...	[illegible]	[illegible]
Wood goods	...	[illegible]	...	[illegible]	[illegible]
Matches	Kilos	[illegible]	...	[illegible]	[illegible]

RETURN of Collections of Customs in Oscarshamn Custom-House District for the Years 1891–93.

Description.	1891.	1892.	1893.
	Kronor öre.	Kronor öre.	Kronor öre.
Duties	89,058 51	89,228 55	88,685 35
Lastage	4,508 82	4,162 40	4,326 98
Sundries	953 78	942 8	1,304 20
Light and beacon dues ..	21,736 6	21,217 57	21,461 29
Total	116,257 17	115,550 60	116,277 82
At 18 kronor to 1*l.* =	6,458*l.* 14*s.* 6*d.*	6,419*l.* 9*s.* 7*d.*	6,459*l.* 17*s.* 7*d.*

SÖDERHAMN.

RETURN of Principal Articles of Import to Söderhamn during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Grain and flour	Cwts. ...	12,175	...	12,344	...
Meat and pork	,, ...	280	...	693	...
Coffee	,, ...	349	...	170	...
Sugar	,, ...	64	...	174	...
Molasses	,, ...	493	...	359	...
Butter	,, ...	91	...	104	...
Fish, all sorts	,, ...	...	...	380	...
Coals	Cubic feet	142,960	...	703,262	...
Salt	,, ...	23,114	...	39,308	...
Spirits, all sorts	Gallons ...	1,560	...	101	...
Manure	Cwts. ...	3,289	...	13,505	...
Pig iron	,, ...	2,913	...	...	...
Agricultural implements ...	...	...	173	...	545

RETURN of Principal Articles of Export from Söderhamn during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Wood	Standards	97,474	...	101,680	...
Iron	Cwts. ...	86,292	...	149,099	...
Wood-pulp	,, ...	48,106	...	37,746	...

RETURN of all Shipping at the Port of Söderhamn during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	140	102	81,482	103	81,631
Swedish	60	14,096	62	30,579	122	44,445
Norwegian	49	24,332	13	8,969	62	33,301
Danish	24	3,965	14	9,083	38	13,048
Russian	17	5,123	5	1,020	22	6,143
German	11	3,676	38	21,603	49	25,279
Other countries ...	8	1,895	1	860	9	2,755
Total	170	53,606	235	153,396	405	207,002

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	140	102	81,482	103	81,631
Swedish	110	26,740	71	46,328	181	73,068
Norwegian	51	25,343	22	11,650	73	36,993
Danish	24	4,965	14	9,083	38	13,048
Russian	17	5,123	5	1,020	22	6,143
German	11	3,676	38	21,603	49	25,279
Other countries ...	8	1,895	1	860	9	2,755
Total	222	66,881	253	172,026	475	238,907

KALMAR

RETURN of Principal Articles of Import to Kalmar during the Years 1893–92.

Articles.		1893		1892.	
		Quantity.	Value	Quantity.	Value.
			£		£
Coals	Tons ..	17,100	13,825	11,120	8,412
Wheat	Quarters	53,850	67,300	62,081	108,641
Rye	,,	22,100	23,415	18,712	28,065
Herrings	Barrels ..	6,280	5,060	9,817	7,032
Coffee	Tons ..	132	8,310	120	11,210
Sugar	,, ..	96	6,220	24	1,192
Petroleum	Gallons ..	113,100	2,872	97,650	2,123
Tobacco	Tons ..	69	4,325	82	5,365
Hides	,, ..	67	6,945	72	7,114
Salt	,, ..	740	693	920	810
Manure	,, ..	1,658	5,015	2,739	7,234
Total	..	..	143,983	..	187,198

RETURN of Principal Articles of Export from Kalmar during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Oats	Quarters	49,725	46,500	24,612	22,109
Matches	Tons ..	136	5,770	87	3,045
Spars..	Standards	7,010	34,600	8,615	43,075
Deals	„	2,170	13,020	2,123	12,738
Boards	„	3,355	16,775	4,640	23,212
Total	..	..	116,665	..	104,179

TABLE of Exports and Imports of Kalmar during the Years 1893–92.

	Value.	
	1893.	1892.
	£	£
Exports	116,665	104,179
Imports	143,983	187,198

RETURN of all Shipping at the Port of Kalmar during the Year 1893.

ENTERED.

Country or Port.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Argentina	1	462·42	...	...	1	462·42
Great Britain ...	29	7,206·81	7	3,363·44	36	10,570·25
Bremen	2	184·38	...	...	1	184·38
Denmark	283	26,396·76	78	22,863·05	361	49,259·81
Finland	...	...	1	377·69	1	377·69
France	1	178·40	...	...	1	178·40
Hamburg	2	463·17	1	368·31	3	831·48
Holland	1	80·64	1	657·49	2	738·13
Lübeck	21	1,681·05	102	39,550·05	123	41,231·10
Mecklenburg ...	24	2,715·25	1	398·86	25	3,114·85
North America ...	...	...	1	1,793·03	1	1,793·03
Norway	3	176·26	40	16,437·69	43	16,613·95
Pommern	36	2,036·02	15	4,305·71	51	6,341·73
Portugal	3	761·33	...	...	3	761·33
Prussia	10	1,151·64	10	2,453·26	20	3,604·90
Russia	1	141·89	10	4,413·97	11	4,555·86
Schleswig-Holstein	67	5,067·26	4	597·32	71	5,664·58
Total	484	48,703·28	271	97,579·87	755	146,283·89

CLEARED.

Country or Port.	Sailing.		Steam		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels	Tons.
Great Britain	107	20,307·05	17	8,469·92	124	28,776·97
Denmark	263	17,566·80	3	568·38	266	18,135·18
Finland	2	661·39	1	315·83	3	977·22
France	...	...	1	436·54	1	436·54
Hamburg	7	917·67	4	1,363·09	11	2,280·76
Holland	...	...	2	1,615·67	2	1,615·67
Lübeck	23	2,397·10	73	29,218·66	106	31,615·76
Mecklenburg ...	8	679·65	1	156·40	9	836·05
Norway	...	...	33	14,179·24	33	14,179·24
Pommern	15	528·09	8	1,915·34	23	2,443·43
Prussia	12	805·14	2	499·03	14	1,304·17
Russia	2	233·00	10	3,039·79	12	3,272·79
Schleswig-Holstein	72	5,313·05	4	597·32	76	5,910·37
Total	521	49,408·34	159	62,375·21	680	111,784·15

GOTLAND.

RETURN of Principal Articles of Import to Gotland during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Kilos.	£	Kilos.	£
Fish, salted	51,100	..	128,000	..
Rice	108,302	..	170,000	..
Manure	1,065,950	..	900,000	..
Iron goods	1,360	..	10,000	
Coffee	568	..	..	..
Petroleum	289,641	..	228,000	
Coals	9,163	..	8,238	..

RETURN of Principal Articles of Export from Gotland during the Year 1893.

Articles.		Quantity.	Value.
			£
Grain	Quarters ..	995	..
Wood	Standards ..	3,582	..
Lime	Kilos. ..	1,651,349	..
Cement	,, ..	2,154,750	..

RETURN of all Shipping at the Island of Gotland during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	...	...	...	...
Swedish	163	14,798	11	2,359	174	17,157
Norwegian	7	1,505	1	251	8	1,756
Other countries ...	34	5,838	5	2,224	39	8,062
Total	204	22,141	17	4,834	221	26,975
,, for the year preceding ...	202	19,977	22	5,953	224	25,930

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	...	...	...	...
Swedish	166	15,317	9	2,271	175	17,588
Norwegian	7	1,450	...	...	7	1,450
Other countries ...	34	4,930	4	1,200	38	6,130
Total	207	21,697	13	3,471	220	25,168
,, for the year preceding ...	198	19,281	24	988	222	20,269

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SWEDEN.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF GOTHENBURG.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1247.

Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.

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SWEDEN.

GOTHENBURG.

Consul Duff to the Earl of Kimberley.

My Lord, *Gothenburg, June* 20, 1894.

I HAVE the honour to transmit to your Lordship herewith my Report on the Trade and Commerce of this Consular District for the year 1893.

I have, &c.
(Signed) JOHN DUFF.

Report on the Trade and Commerce of the Consular District of Gothenburg for the Year 1893.

ABSTRACT of Contents.

	PAGE
Trade generally	2
Exports	2
Imports	2
Exports—	
Butter	3
Grain	3
Iron	3
Wood	3
Imports –	
Coal	4
Fish	4
Flour	4
Machinery	4
Molasses	4
Pig-iron	4
Rye-meal	4
Salt	4
Tinned plates	4
Freights	4
Harbour	5
Herring fishing	5

Abstract of Contents—continued.

	Page
Railways	5
Return of all shipping	6
„ principal exports	7
„ „ imports	8
Report from Vice-Consul at Strömstad	10
„ „ Uddevalla	12
„ „ Marstrand	14
„ „ Warberg	15
„ „ Halmstad	17
„ „ Helsingborg	19
„ „ Landscrona	21
„ „ Malmö	23
„ „ Ystad	26
„ „ Carlscrona	27

Trade and Commerce.

Trade generally.

It may be said of the year 1893 that it produced no improvement in the depressed times complained of during the latter years.

Amidst all the uncertainty and lack of enterprise, the result of the general depression, which has prevailed during the last 4 years, there is one satisfactory element to remark, namely that business transactions have been conducted with greater precaution and forethought.

Exports.

There is an increase in the export from Gothenburg of bacon, bobbins, bottles, butter, cardboard, chain, grain, pig-iron, shapes and plates, lead, matches, sleepers, joinery, laths, wood-pulp, and woollen yarn, whereas the export of other articles such as cheese, herrings, rolled and hammered bar iron, ingots, blooms, billets and rough bar iron, nails, zinc, manganese, iron, and lead ores, live-stock, paper, textiles, pit-props, deals, battens and boards, and cotton-yarn was less than in 1892.

Imports.

Of the principal articles of import to Gothenburg, alkali, almonds, alum, cinnamon, coke, aniline, whitelead and zinc, chloride of lime, chlorate of potash, coffee, cotton, feathers, fennel, fertilisers, cured herrings, fresh fruits, berries and greenstuffs, ginger, glauber-salts, flour, rye, meal, wheat, barley, cured hides and skins, jute, rails, iron and steel pipes, bars, balks, angle and fancy iron, lead, molasses, paraffin and naphtha, oleine, plums and prunes, porcelain, potash, raisins, saltpetre, salt, shoddy, spirituous liquors, starch, raw sugar, sulphur and flowers of sulphur, tea, woollen and cotton textiles, hosiery, thread, tobacco, wool and yarn of wool, linen and jute, shows an increase; on the other hand the import of bacon, bran, bricks, butter, canned articles, cardboard, coal, indigo, chemical preparations, cork-bark, envelopes, figs, flax, dry fish, glass, glue, rye, maize, beans, gypsum, hats, hemp, raw hides and skins, hops, pig-iron, tinned plate, zinc and tin, copper, nails, oil-cake, linseed and train oils, oranges, paper, pepper, rice, rope, resin, seed, refined sugar, tallow, textiles of linen and silk, turpentine oil and spirits of turpentine, umbrellas and parasols, wine, and cotton yarn, decreased as compared with the preceding year.

The export of butter from Sweden during 1893 increased about 15 per cent., this considerable rise being doubtlessly caused by the starting of new dairies and some of the old ones having increased their production. The English market has throughout the year been very satisfactory. The severe winter did not interrupt the regular shipments from this port, except one week when the harbour was closed by ice. In consequence of the drought during the early part of the summer a small production of butter was anticipated, but the refreshing rains which commenced in July improved pasturages, and the autumn productions turned out unusually large, which, as a rule, is not the case at that time of the season. Exports: Butter.

The prospects of the grain trade were satisfactory and prices rose gradually. Towards the autumn, however, the price of oats declined, and the demand for black oats was rather insignificant excepting from France, which country proved a good customer for this article. White oats found a good market in Germany in consequence of the conflict between that country and Russia relative to the customs duties. The cereal which turned out most remunerative to the agriculturist was barley, the price of which exceeded that of wheat and rye. The price of oats was also higher than that of rye. Grain.

The total production of iron during the year was as follows:— Iron.

Articles.	Quantity.	Increase.	Decrease.
	Tons.	Tons.	Tons.
Pig-iron	450,901	..	27,795
Cast-iron	221,780	..	13,646
Bessemer iron	84,837	2,451	..
Martin iron	78,485	3,854	..

being 35,136 tons less than in 1892.

The quotations of the Ironmasters' Association, on November 29, per ton, f.o.b. at Gothenburg, without discount, were as follows:—

Description.	Value.
	£ s. d.
Ordinary hammered iron	8 2 6
,, rolled iron	7 15 0
Rolled shapes	7 15 0

The report of the Ironmasters' Association of November states that there was no improvement in the principal markets, and that the few contracts concluded up to that time gave no guidance as to what the prospects might be. Orders from America were particularly scarce, and could not be expected to become very numerous until the customs tariff of that country had been decided.

The timber trade was rather changeable. The prices quoted Wood.

by the exporters here at the beginning of the year for sawn wood goods were only obtainable in a few instances and for the more current dimensions. The prices declined gradually towards the commencement of the Baltic shipments, but early in the autumn the market improved somewhat in spite of the prevailing dulness in almost all branches of trade.

Imports Coal. The general depression in trade and shipping caused a decline in the import of coal to this port of 4,217 tons.

Fish. Although the herring fishing on this coast was very abundant, the import of cured herring from Norway exceeded that of the preceding year. The reason of this is that Norway produces a finer quality of fish, and when the supplies of that country are large, it is in a position to offer a superior article at a comparatively moderate price.

Flour. The high price of native rye-meal increased the import of flour from Denmark, Germany, and the United States of America, particularly from the latter country.

Machinery The import duty on machinery and implements of 10 per cent., which came in force in June, 1892, now enables native makers to supply various machinery and implements. Special plant, as for instance cotton and paper mill and workshop machinery, &c., must, however, as hitherto, be imported chiefly from Great Britain.

Molasses. The United States of America supplied molasses at such a low figure that hardly any other country, except certain English brands, could compete in this article.

Pig-iron. Owing to a good supply of scrap-iron and the low price of native pig-iron, the import of this article from Great Britain was less than usual.

Rye-meal. The cheapness of German rye-meal raised the import of this article to 40,323 bags, against 21,779 bags in 1892.

Salt. The herring curers on this coast are now beginning to import their requirements of salt themselves direct, hence the decline in the import of salt to Gothenburg.

Tinned plates. The competition in the tinned plate trade is very keen, and makers must be content with a small profit. This article is chiefly used for canned goods and the lining of match cases intended for export to the colonies.

Freights. The advantage of ships fitted with triple-cylinder engines has been fully proved during the last year, since steamers provided with these engines have in most cases been running without loss, whereas numerous cases may be mentioned where steamers fitted with the ordinary two-cylinder engines have been causing loss to their owners.

As early as in January wood charters were concluded, principally to Dutch ports, at comparatively fair rates. Stagnation in business characterised the month of March, contrary to which charters were daily concluded during April, but at unsatisfactory rates. Although charters continued to be concluded during May and June there was no improvement in the rates, these still being low and the market dull. In the beginning of July there was a slight improvement in the freights, but trade appeared rather slack.

In the months of August and September the demand for tonnage increased, trade improved, and freights advanced. During the last 3 months of the season no changes in the freights of any consequence took place. As usual the coal freights fluctuated greatly, and on the whole it may be said that the freight market has been anything but satisfactory.

Harbour.

The want of sufficient quay accommodation for sea-going vessels, greatly felt of later years, is now remedied by a new quay 1,530 feet long with 20 feet of water, lately completed and which will shortly be opened to traffic. This quay is provided with four spacious goods sheds and two portable modern steam cranes for the loading and discharging of vessels.

Herring fishing.

The herring fishery was abundant, and no doubt left a good profit to the fishermen since better prices were obtained than in the previous seasons. The export of fresh herring, which chiefly takes place to England and Germany, has been attended with good results, particularly to those who have been engaged in the export to the latter country. Large quantities of herring is turned into oil and manure, which finds a good demand both in and out of Sweden.

Railways.

The completion of the railway system throughout the country is progressing steadily, and a line which is expected to increase the trade of this place to a large extent is the direct one now being built from the manufacturing town of Borås to Gothenburg.

RETURN of all Shipping at the Port of Gothenburg during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	26	6,182	183	185,112	209	191,294
Swedish	216	40,375	1,278	554,527	1,494	594,902
Danish	143	12,089	350	83,777	493	95,866
German	17	1,647	42	67,159	59	68,806
Norwegian	63	16,545	89	32,802	152	49,347
Other countries ...	24	7,588	5	4,370	29	11,958
Total	489	84,426	1,947	927,747	2,436	1,012,173
,, for the year preceding ...	571	106,281	2,125	922,521	2,696	1,028,802

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	25	5,554	182	182,125	207	187,679
Swedish	190	44,934	1,285	562,066	1,475	607,000
German	23	3,777	62	110,299	85	114,076
Danish	138	12,222	349	83,970	487	96,192
Norwegian	67	18,563	94	35,611	161	54,114
Other countries ...	24	6,594	5	4,370	29	10,964
Total	467	91,584	1,977	978,441	2,444	1,070,025
,, for the year preceding ...	560	102,806	2,174	951,254	2,734	1,054,060

RETURN of Principal Articles of Export from Gothenburg during the Years 1893–92.

Articles.		Quantity.	
		1893.	1892.
Bacon	Cwts.	34,881	25,100
Bobbins	Value £	22,162	18,486
Bottles	Cwts.	106,209	98,540
Butter	„	225,468	190,820
Cardboard	„	43,134	34,120
Chain	„	4,357	4,240
Cheese	„	1,804	2,400
Grain—			
Oats	„	1,077,551	360,880
Beans	„	24,580	13,960
Vetches	„	10,980	520
Herrings—			
Fresh	Tons	15,142	18,669
Cured	„	10,492	11,046
Metals—iron and steel—			
Pig-iron	„	14,399	12,656
Rolled and hammered bars	„	67,388	75,512
Ingots	„	757	1,550
Blooms, billets, and rough bars	„	3,756	4,095
Nails	„	1,739	2,090
Shapes and plates	„	850	465
Metals—other kinds—			
Zinc ore	„	23,196	23,897
Manganese ore	„	2,372	4,815
Iron ore	„	12	31,911
Lead ore	„	607	611
Lead	„	291	93
Live stock—			
Horses	Number	42	219
Cattle	„	708	778
Matches	Cwts.	155,108	149,440
Paper	Tons	12,020	15,306
Textiles—			
Cotton	Cwts.	8,348	9,700
Linen and hemp	„	415	420
Woollen	„	512	1,400
Wood goods—			
Pit-props	Standards	62,971	73,971
Deals, battens, and boards	„	40,721	42,292
Sleepers	„	1,406	669
Joinery	Value £	111,727	103,215
Laths	„	27,768	27,725
Other wood goods	Standards	308	463
Wood-pulp	Tons	58,917	57,167
Yarn—			
Cotton	Cwts.	8,600	9,938
Woollen	„	1,341	1,215

RETURN of Principal Articles of Import to Gothenburg during the Years 1893–92.

Articles.		Quantity.	
		1893.	1892.
Alkali	Tons	4,821	4,692
Almonds	Cwts.	1,700	1,443
Alum	„	1,560	1,284
Asphalte	Tons	1,033	908
Bacon	„	409	1,026
Bran	„	1,629	1,678
Bricks—			
Fire and fancy	Number	631,918	1,059,463
Tiles	Cwts.	137	311
Butter	„	6,883	9,969
Candles	„	727	664
Canned articles	„	2,198	2,598
Cardboard	„	4,347	5,904
Cement	„	6,077	3,962
Cheese	„	597	444
Cinnamon	„	710	688
Coal	Tons	384,329	388,546
Coke	„	42,163	29,206
Colours—			
Aniline	Cwts.	1,380	1,360
White lead and zinc	„	12,241	9,780
Indigo	„	1,067	1,571
Chloride of lime	„	13,188	12,900
Chlorate of potash	„	12,326	11,400
Chemical preparations	Value £	4,715	7,733
Coffee	Tons	5,701	5,054
Cork bark	Cwts.	6,413	8,160
Cotton	Tons	6,002	5,662
Envelopes	Cwts.	522	737
Feathers	„	291	240
Fennel	„	904	623
Fertilisers	Tons	27,148	24,616
Figs	Cwts.	912	1,120
Flax	„	10,406	11,240
Fish—			
Salt, herring	Tons	6,516	3,383
Dry	„	409	476
Fruits, berries and greenstuffs, fresh	Cwts.	4,253	3,980
Ginger, dry	„	197	184
Glass—			
Window	„	3,224	6,040
Plate	„	807	1,020
Glauber-salts	Tons	1,779	1,204
Glue	Cwts.	1,439	2,100
Grain—			
Flour, wheat	Bags	100,034	68,898
„ rye	„	40,323	21,779
Unground, wheat	Tons	12,881	10,846
„ rye	„	1,883	2,386
„ maize	„	994	4,905
„ barley	„	670	1,148
„ beans	„	219	247
Gypsum	„	1,572	1,852
Hats	Number	24,563	33,565
Hemp	Tons	513	556

RETURN of Principal Articles of Import to Gothenburg during the Years 1893–92—continued.

Articles.		Quantity.	
		1893.	1892.
Hides and skins—			
Raw	Tons	801	939
Cured	„	735	648
Hops	Cwts.	2,160	2,420
Jute	Tons	1,131	523
Machinery and implements	Value £	111,926	214,437
Metals—			
Pig-iron	Tons	7,832	9,299
Rails	„	7,401	4,102
Iron and steel pipes	„	1,905	..
Bars, balks, angle and fancy	„	1,755	1,166
Plates, tinned	„	1,504	1,786
Other kinds	„	293	230
Zinc and tin	„	842	854
Lead	„	508	500
Copper	„	283	389
Molasses	„	3,993	3,452
Nails	„	342	663
Oilcake	„	6,153	6,718
Oils—			
Paraffin and naphtha	„	7,936	6,495
Linseed	„	376	623
Train	„	337	367
Other kinds	„	3,137	3,241
Oleine	„	320	296
Oranges	„	336	384
Paper	„	673	1,074
Pepper	Cwts.	1,797	1,998
Plums and prunes, dry	„	3,417	2,820
Porcelain	„	4,560	4,440
Potash	„	10,960	8,740
Raisins	„	6,500	5,780
Rice	Tons	2,825	2,906
Rope	Cwts.	1,380	1,899
Resin	Tons	934	1,320
Saltpetre	Cwts.	1,200	959
Salt	Tons	20,256	21,128
Seed, chiefly linseed and rape-seed	„	5,385	6,690
Shoddy	„	798	584
Spirituous liquors, chiefly arrack, cognac, and whisky	Gallons	115,016	102,051
Starch	Cwts.	1,960	1,335
Sugar—			
Raw	Tons	4,222	3,330
Refined	„	296	522
Sulphur and flowers of sulphur	„	3,732	2,838
Tallow	Cwts.	5,460	8,180
Tea	„	1,280	1,260
Textiles—			
Woollen	„	10,900	10,000
Cotton	„	6,180	5,660
Linen	„	2,780	3,040
Hosiery	„	1,260	900
Silk	„	160	300

RETURN of Principal Articles of Import to Gothenburg during the Years 1893–92—continued.

Articles.		Quantity.	
		1893.	1892.
Thread—			
Cotton	Cwts.	2,760	2,560
Linen	„	120	100
Tobacco, raw	Tons	875	784
Turpentine oil, and spirits of..	Cwts.	1,480	1,940
Umbrellas and parasols ..	Number ..	22,641	56,145
Wine	Gallons ..	75,431	156,773
Wool	Tons	966	871
Yarn—			
Cotton	„	1,346	1,473
Woollen	„	1,128	990
Linen and jute	„	740	460

STRÖMSTAD.

Mr. Vice-Consul Lundgren reports as follows :—

Trade generally. The general depression in trade which has been felt during latter years remains unchanged.

Exports. Cattle. Meat. The import of cattle to Norway from this country being still prohibited, owing to the cattle disease in the south of Sweden, a considerable quantity of fresh meat has been exported to Norway instead, as will be seen from the list of exports.

Granite. Herrings. The export of granite for pavement is somewhat less than in the previous year, whereas that of herrings shows an increase.

Imports. Salt. Coal. Of salt there was less imported than during the previous year, which remark is also applicable to the import of coal, the latter article having greatly risen in price.

Customs. The dues collected by the customs amounted to 2,037*l.*, against 1,501*l.* in 1892.

Shipping. The merchant fleet of this town and district consists of 49 sailing vessels and 3 steamers, of an aggregate tonnage of 7,380 tons, or 152 tons less than last year.

Freights. The freight market has been most unsatisfactory throughout the year.

Harbour. The inner harbour of this port was closed by ice for some time during the early part of the year, as was the case with the other harbours on the coast, but the outer harbour was throughout the winter accessible to steamers engaged in the Swedish fresh herring trade with Great Britain.

Harvest. On account of the dry weather the yield of hay was not so plentiful as during the preceding year, whereas the crop of rye turned out very satisfactory. Oats yielded scarcely an average crop.

The prices of agricultural produce are low, affording no profit to the farmers.

RETURN of all Shipping at the Port of Strömstad during the Years 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	9	807	...	...	9	807
Swedish	442	10,767	249	46,225	691	56,992
Norwegian	158	7,615	495	40,390	653	48,005
Other countries ...	23	3,548	9	1,983	32	5,531
Total	632	22,737	753	88,598	1,385	111,335
,, for the year preceding ...	615	25,349	914	104,103	1,529	129,452

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	8	738	...	...	8	738
Swedish	506	10,762	185	38,218	691	48,890
Norwegian	164	8,272	501	41,104	665	49,376
Other countries ...	21	3,106	9	1,983	30	5,089
Total	699	22,788	695	81,305	1,394	104,093
,, for the year preceding ...	662	23,886	837	85,065	1,499	108,951

RETURN of Principal Articles of Export from Strömstad during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Eggs	Scores ..	338,292	15,035	398,947	19,947
Fresh meat	Cwts. ..	2,548	3,610	..	..
Granite	..	..	20,915	..	27,390
Herrings	Barrels ..	133,639	46,799	93,595	28,883
Live stock	Number ..	..	..	5,245	16,069
Oats	Quarters ..	1,933	1,753	4,988	3,392
Total	..	..	88,112	..	95,681

RETURN of Principal Articles of Import to Strömstad during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Barrels	Number..	..	..	122,435	7,600
Coal..	Tons ..	1,783	1,604	2,658	2,126
Grain	,, ..	509	3,162	438	3,167
Herrings	Barrels ..	14,623	10,967	9,160	6,870
Salt	Tons ..	4,298	3,582	6,896	5,746
Total	..	..	19,315	..	25,509

UDDEVALLA.

Mr. Vice-Consul Thorburn reports as follows :—

Trade generally.

There has been little activity in trade during the year, prices having, as a rule, had a downward tendency.

Exports. Fish. Oats. Paper. Wood.

Notwithstanding the low prices obtained, most of the principal articles of export from this port—as, for instance, fish, oats, paper, and wood—show an increase in the export list compared with the preceding year.

Imports. Coal. Rails.

The import of coal has fallen off considerably, owing to the coal strikes in Great Britain and consequent high prices.

Rails, which hitherto have always been imported from Great Britain, have lately been bought from Belgium for a narrow-gauge railway now under construction here.

Shipping.

With the low freights ruling throughout the year, shipping has proved unremunerative, and the old wooden sailing vessels belonging to this district can no longer compete in the general carrying trade.

Agriculture.

The duties imposed on the chief agricultural produce not having proved of any advantage, and the crops raised last season being insufficient, land is falling off in value, and the state of this district not improving.

Fisheries.

Several English fishing smacks have lately been bought by fishermen here, who find the English craft more suitable for deep-sea fishery than the boats generally built on this coast.

Wages.

The emigration from this country to the United States of America, where there appears to be less demand now for manual labour, having lately decreased, the rate of wages here is rather reduced.

RETURN of all Shipping at the Port of Uddevalla during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	126	2	1,418	3	1,544
Swedish	25	4,229	67	31,380	92	35,609
Norwegian	14	2,739	9	2,226	23	4,965
Other countries ...	6	341	1	279	7	620
Total	46	7,435	79	35,303	125	42,738
,, for the year preceding ...	70	8,864	64	26,145	134	35,009

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	2	224	4	2,813	6	3,037
Swedish	45	5,030	76	31,723	121	36,753
Norwegian	14	2,442	11	2,608	25	5,050
Other countries ...	7	508	1	255	8	763
Total	68	8,204	92	37,399	160	45,603
,, for the year preceding ...	93	10,569	69	28,332	162	38,901

RETURN of Principal Articles of Export from Uddevalla during the Years 1893–92.

Articles.		Quantity.	
		1893.	1892.
Fish	Tons	687	331
Matches	,, ...	781	1,029
Oats	Cwts.	305,350	135,043
Paper	,, ...	44,407	42,060
Wood	Standards ..	7,493	6,300
Other articles	Tons ,, ..	73	46

RETURN of Principal Articles of Import to Uddevalla during the Years 1893–92.

Articles.		Quantity.		
			1893.	1892
Coal and coke	Tons		14,170	21,964
Cotton	Cwts		6,772	5,637
Flour and rye-meal	,, ...		960	..
Grain	,, ...		..	9,351
Machinery	Value	£	173	3,148
Manure	Cwts.		56,787	75,182
Oils	,, ...		9,314	15,702
Rails	Tons		3,500	..
Salt	,, ...		1,170	..
Tallow	Cwts... ..		3,296	..

MARSTRAND.

Mr. Acting Vice-Consul Christenson reports as follows:—

Trade generally.

The navigation in the Cattegat being greatly interrupted by ice during the early part of the year, the direct exports and imports of this place were less than usual.

Exports. Fish.

Marstrand is one of the principal stations of the herring and mackerel fishery on this coast, and exports annually considerable quantities of this fish in its fresh state to Germany and Denmark.

Imports. Coal. Salt.

The direct imports to Marstrand chiefly consists of coal and salt, other requirements being supplied from Gothenburg.

RETURN of all Shipping at the Port of Marstrand in the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels	Tons
British	1	98	...	...	1	98
Swedish	40	3,613	11	3,016	51	6,629
Danish	15	230	61	14,669	76	14,899
Other countries ...	2	276	18	3,285	20	3,561
Total	58	4,217	90	20,970	148	25,187
,, for the year preceding ...	93	4,065	142	30,647	235	34,712

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	98	...	...	1	98
Swedish	36	2,677	19	4,165	55	6,842
Danish	13	201	56	13,644	69	13,845
Other countries ...	1	142	22	4,466	23	4,608
Total	51	3,118	97	22,275	148	25,393
,, for the year preceding ...	84	2,975	151	32,751	235	35,726

RETURN of Principal Articles of Export from Marstrand during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Fish	Tons ..	20,227	27,900	29,250	40,513
Oats	Cwts. ..	..	..	3,580	1,094
Total	..	..	27,900	..	41,604

RETURN of Principal Articles of Import to Marstrand during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Coal	Tons ..	835	696	408	340
Potatoes	Cwts. ..	..	..	1,170	228
Salt	Tons ..	1,664	1,553	3,887	3,340
Total	..	..	2,249	..	3,908

WARBERG.

Mr. Vice-Consul Jobson reports as follows:—

The trade of this port has been dull throughout the year, and there is no sign of an improvement. Trade generally.

This port having no regular direct steamboat communication with other countries, considerable quantities of the produce of this district are sent to Gothenburg, Helsingborg, and Halmstad for shipment. Exports.

Imports. Of the chief articles of import to Warberg, cotton is imported direct from America; coal and coke, machinery, manure, and rails from Great Britain; flour and meal, manure and oils from Germany and Denmark; and salt from Portugal.

Customs. The dues collected by the customs amounted to 10,050*l.*, against 10,250*l.* in 1892.

Freights. There has been a slight improvement in the freights when compared with the rates of last year.

Merchant navy. Ten vessels, of an aggregate tonnage of 610 tons, belong to this port.

Roads and harbour. The roads and harbour are well sheltered, and the latter affords every facility for the discharge and loading of vessels.

Crops. All crops were well housed and gave a full average yield, except hay, which turned out below the average.

Grain. Since the spring the prices of grain have declined, and towards the close of the year the quotations were: for wheat, 6*s.* 8*d.* per cwt.; rye, 5*s.* per cwt.; barley, 5*s.* 10½*d.* per cwt.; and oats, 5*s.* 10½*d.* per cwt. The comparatively high price of oats was caused by a brisk demand for this cereal from Germany and Denmark.

Fisheries. In consequence of the boisterous weather during the autumn, the herring fishing did not turn out satisfactory, contrary to which haddock, cod, and flat-fish gave a good result.

Railways. A narrow gauge railway from the port of Falkenberg to the interior, a distance of about 22 miles, is under construction.

RETURN of all Shipping at the Port of Warberg during the Year 1893.

Nationality.	Entered.		Cleared.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	7	3,395	6	3,141
Swedish..	132	14,953	280	30,375
Danish	86	4,208	90	4,619
German..	21	2,425	25	2,777
Other countries ..	10	2,585	10	2,585
Total	256	27,566	411	43,497
„ for the year preceding ..	217	26,386	423	43,361

RETURN of Principal Articles of Export from Warberg during the Years 1893–92.

Articles.		Quantity.	
		1893.	1892.
Butter	Cwts.	12,250	10,500
Fish	„ ..	1,160	480
Granite	Value £	8,630	9,210
Oats	Cwts.	53,620	34,000
Wood	Standards ..	5,005	4,500

RETURN of Principal Articles of Import to Warberg during the Years 1893–92.

Articles.		Quantity.	
		1893.	1892.
Coal and coke	Tons	15,840	18,910
Coffee	Cwts.	2,730	2,440
Cotton	„	5,060	10,500
Flour and meal	„	11,200	8,580
Machinery	Value £	2,700	4,210
Manure	Cwts.	4,560	18,300
Oils	„	15,780	15,920
Rails	Tons	6,075	..
Salt	„	1,150	1,210
Textiles	Cwts.	4,180	4,570

HALMSTAD.

Mr. Vice-Consul Beckeman reports as follows :—

The trade of this port has been of about the same extent as that of the year before. **Trade generally.**

Although the prices of the chief articles of export of this district ruled low throughout the year, still most articles show an increase in the export list when compared with the preceding year. **Exports.**

Of the principal articles of import to this place, bran, herring, jute, manure, paraffin oil, rice, and wool show an increase, whereas of coal, flour, wheat, and linseed cake less was imported than during the previous year. **Imports.**

RETURN of all Shipping at the Port of Halmstad during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	2	181	15	4,998	17	5,179
Swedish	389	21,731	188	50,089	577	71,820
Danish	318	18,721	10	518	328	19,239
German	80	5,286	34	10,726	114	15,712
Other countries ...	42	4,732	2	452	46	5,184
Total	831	50,651	249	66,483	1,082	117,134
,, for the year preceding ...	974	61,145	232	60,582	1,206	121,727

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	5	352	12	4,244	17	4,596
Swedish	543	23,814	170	46,244	713	70,058
Danish	326	13,593	13	669	336	20,262
German	78	4,263	40	11,378	118	15,641
Other countries ...	45	5,094	2	1,717	47	6,771
Total	997	53,106	234	64,242	1,231	117,348
,, for the year preceding ...	1,135	67,596	249	67,319	1,384	134,915

RETURN of Principal Articles of Export from Halmstad during the Years 1893–92.

Articles.		Quantity.	
		1893.	1892.
Balks and rafters	Standards ..	7,538	6,151
Butter	Cwts.	1,008	15
Cranberries	,, ...	4,915	385
Granite	Value £	20,895	22,432
Oats	Cwts.	83,709	70,838
Pit-props	Standards ..	12,478	13,927
Wood-pulp	Tons	4,141	3,497

RETURN of Principal Articles of Import to Halmstad during the Years 1893–92.

Articles.		Quantity.	
		1893.	1892.
Bran	Tons	2,742	818
Coal	„	19,223	21,210
Flour	„	221	231
Grain, wheat	„	2,555	2,597
Herring, cured	„	244	185
Jute	„	2,745	2,221
Linseed cake	„	469	630
Manures	„	4,286	3,851
Paraffin oil	„	938	800
Rice	„	270	136
Wool	„	208	43

HELSINGBORG.

Mr. Vice-Consul Westrup reports as follows:—

Trade generally.

Notwithstanding the general dulness in trade and commerce everywhere else, Helsingborg has made a steady progress both in shipping and trade as will be seen by reference to the returns of shipping, exports and imports, which accompany this report.

Exports. Cattle.

On account of the foot-and-mouth disease in the province of Scania, the export of cattle from this district has decreased considerably, the principal markets abroad being closed to Swedish cattle.

Harbour.

The deepening of the harbour is proceeded with, and vessels drawing up to 20 feet of water can now enter and discharge along the quays.

Shipbuilding.

The shipbuilding yard here has been well employed throughout the year, one iron vessel having been launched and the building of another commenced, besides which a number of wooden vessels have undergone repairs.

Railways.

By the opening to traffic of the Scania-Småland Railway, from the Astorp station on the Helsingborg-Hessleholm Railway to Markaryd, a village in the province of Småland, a large district has been opened to the trade of Helsingborg.

Town hall.

A new large town hall is now being built here.

RETURN of all Shipping at the Port of Helsingborg during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	185	57	42,304	58	42,489
Swedish ...	2,365	78,823	923	408,126	3,288	487,949
Danish	155	6,864	2,270	500,810	2,425	507,674
Norwegian	27	7,265	89	31,345	116	38,611
German	51	3,436	47	20,305	98	23,741
Other countries ...	24	6,435	7	4,325	28	10,760
Total	2,578	94,845	3,402	907,415	5,980	1,002,263
,, for the year preceding ...	2,684	88,347	3,489	901,763	6,173	990,110

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	185	57	42,304	58	42,489
Swedish	2,550	69,808	918	285,078	3,177	360,944
Danish	171	6,864	2,270	500,810	2,400	507,674
Norwegian	26	6,710	90	31,743	116	38,453
German	49	2,089	47	20,185	96	22,274
Other countries ...	19	5,004	7	4,326	26	9,330
Total	2,525	82,608	3,397	904,367	5,922	986,975
,, for the year preceding ...	2,688	73,702	3,486	900,028	6,194	973,730

RETURN of Principal Articles of Export from Helsingborg during the Years 1893–92.

Articles.		Quantity.	
		1893.	1892.
Beef and bacon	Tons	2,289	2,883
Butter	,, ...	2,897	2,427
Clay goods	Number ..	5,165,000	4,254,000
Eggs	Tons	54	28
Fish	,, ...	991	785
Firewood	Cubic fathoms	2,000	1,025
Grain	Tons	11,170	14,000
Iron	,, ...	3,100	1,278
Live stock	Number ..	3,581	11,226
Machinery	Tons	284	75
Manure	,, ...	522	595
Purple ore	,, ...	2,000	1,153
Staves and laths	Number ..	5,700,000	5,070,250
Sugar and syrup	Tons	3,080	1,397
Wood pulp	,, ...	3,206	838

RETURN of Principal Articles of Import to Helsingborg during the Years 1893–92.

Articles.		Quantity.	
		1893.	1892.
Bran	Tons	2,047	1,514
Coal and coke	„	88,929	81,859
Coffee	„	562	426
Grain	„	14,058	12,153
Iron	„	3,152	4,580
Oil-cake	„	1,715	2,233
Manure	„	22,048	27,088
Oils	„	1,758	1,752
Ore	„	12,239	6,441
Salt	„	3,050	2,709
Sugar	„	755	571

LANDSCRONA.

Mr. Vice-Consul Neess reports as follows :—

Trade generally. There is not much change in trade and commerce to be reported from this port during the year 1893.

Exports. Grain. The export of grain amounts to more than double the quantity of 1892. The increase consists of oats of which the crop of 1892 was a very good one, but most of it was not shipped until the spring of 1893.

Eggs. Another article of export also shows a considerable increase, namely eggs, which amount to 124,013 scores, against 52,087 scores the preceding year, and seem to become an article worth consideration.

Imports. Sugar. The import of sugar, which almost solely consists of German raw sugar, to the large sugar refinery at this place, shows some increase in spite of the great production of beetroots in the neighbourhood.

Railways. Steamship line. The railway line from Landscrona to Kjeflinge was opened to traffic last summer, and a regular steamship line with Hamburg was started in the course of the year, thus further improving the already existing good communications by land and by sea.

Gunpowder. A large gunpowder mill for the manufacture of smokeless gunpowder is being built by a private company near Landscrona, close to one of the stations on the Landscrona-Kjeflinge Railway, and it is expected that the production will be on a very large scale.

Harvest. The yield of the crops of 1893 was, on the whole, very fair, and all carried in excellent condition ; rye an abundant crop ; wheat an average, but somewhat reduced through frost ; barley an average crop of fine malting quality, and oats below an average owing to drought. The yield of beetroots was the best known for many years ; clover and grass a short crop owing to drought, but of very good quality.

RETURN of all Shipping at the Port of Landscrona in the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	14	14,935	14	14,935
Danish	130	7,353	548	55,292	678	62,645
German	79	3,722	28	10,915	107	14,637
Other countries ...	370	28,988	616	198,587	986	227,575
Total	579	40,063	1,206	279,729	1,785	319,792
,, for the year preceding ...	707	45,154	1,386	291,758	2,093	336,912

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	13	13,866	13	13,866
Danish	130	7,353	548	55,292	678	62,645
German	79	3,722	28	10,915	107	14,637
Other countries ...	383	28,369	617	199,785	1,000	228,154
Total	592	39,444	1,206	279,758	1,798	319,302
,, for the year preceding ...	708	46,734	1,385	292,603	2,093	339,337

RETURN of Principal Articles of Export from Landscrona during the Years 1893–92.

Articles.		Quantity.	
		1893.	1892.
Bacon	Cwts.	13,640	13,340
Butter	,, ...	2,420	2,760
Clay goods	Number ..	5,366,149	4,571,983
Eggs	Scores ..	124,013	52,087
Fish	Cwts.	1,720	1,760
Grain	Tons	6,047	2,781
Hides	Cwts.	580	240
Live stock	Number ..	1,478	2,925
Machinery	Value £	3,370	1,000
Wood	Standards ..	2,527	3,270
Other articles	Tons	824	925

RETURN of Principal Articles of Import to Landscrona during the Years 1893–92.

Articles.		Quantity.	
		1893.	1892.
Bran	Tons	1,932	2,853
Coffee	Cwts... ..	3,580	3,480
Coal	Tons	45,256	46,235
Grain	„	1,925	2,282
Hides	„	166	240
Iron	„	362	998
Machinery	Value £	8,800	14,547
Manure, raw	Tons	7,087	6,338
Oil-cake	„	3,247	2,636
Spirits of wine	Gallons ..	3,124	7,638
Sugar	Tons	3,426	2,534
Textiles...	Cwts... ..	620	1,240
Other articles	Tons	1,867	1,741

MALMÖ.

Mr. Vice-Consul Flensburg reports as follows :—

Trade generally.

There is, no doubt, an improvement in the trade of this place, owing to the widened upland territory, which has been attained by means of new railways and other communications. The financial position may, on the whole, be considered good and sound, and no disturbances of any importance in the shape of failures have taken place, which undoubtedly is a good criterion on the more or less remunerative result of trade and commerce. The coast trade seems to increase from year to year. The shipping trade, which since several years ago has suffered under the influence of uncommonly low freights, shows a lamentable exception from the state of trade in general, the capital invested in shipping having yielded but a scanty profit.

Exports. Live stock.

On the whole the exports from this port figure satisfactorily, with the exception of live stock, which, on account of the principal markets abroad being closed to Swedish cattle, already in 1892 fell off considerably, and now for 1893 is reduced to the limited number of 13,879, being less than one-half of the export in 1892.

Imports. Coal and coke.

The imports, which may be considered the best evidence of the consuming power of a country, have likewise been satisfactory and increasing, excepting coal and coke, which on account of the miners' strike in Great Britain was about 14,500 tons less than the import in 1892.

Customs.

The dues collected by the customs at Malmö in 1893 amounted to 256,395*l.*, against 233,031*l.* in 1892, being an increase of 23,364*l.*

Navigation.

The navigation in the sound northward as well as southward of this port was closed by ice for about 7 weeks during the months

of January–March, and it was only by the aid of a steamer built for ice breaking that the daily communication with Copenhagen could be kept up.

Home ships. The merchant vessels belonging to this port consisted of 10 steamers, of 4,934 tons and 1,195 nominal horse-power, and 39 sailing vessels of 14,925 tons.

Freights. The freights have, as stated above, ruled low throughout the year, leaving no profit to shipowners.

Industries. The industrial establishments of this place, flour mills excepted, have worked with a tolerably good result, and matters have gone on smoothly without strikes and lockouts. Some new factories are under erection.

House building. Shipbuilding. There has been a remarkable increase in private house building. The shipbuilding yards have been well employed throughout the year, both for repairs and new building of steamers for the merchant service as well as the navy.

Harvest. The crops of this district may be estimated as abundant both with regard to quantity and quality, but prices have ruled very low in the absence of any speculative demand.

Railways. The Malmö-Tomelilla Railway has been opened to traffic, and by joining the Cimbrishamn-Tomelilla Railway forms a line through the whole province of Scania from west to east.

A new railway, the Malmö-Genarp, the seventh in order, terminating at Malmö, is being built, and will likely be open to traffic in 1894.

Harbour The improvement of the harbour, deepening and widening of the entrance channel, have been carried out as usual after the plan adopted, and the Town Council has assigned place and means for building a steam-ferry, harbour, and slipway for conducting the trains on the Government railway to Copenhagen.

Population. The population of Malmö has now risen to 50,587 inhabitants, showing an increase on the foregoing year of 1,015 souls.

RETURN of all Shipping at the Port of Malmö during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Swedish	855	44,451	1,[illegible]	[illegible]	1,[illegible]	[illegible]
[illegible]	161	[illegible]	1,[illegible]	[illegible]	1,[illegible]	[illegible]
[illegible]	65	[illegible]	91	[illegible]	156	[illegible]
Norwegian	35	[illegible]	24	[illegible]	59	[illegible]
[illegible]	27	[illegible]	5	[illegible]	32	[illegible]
Total	883	71,414	[illegible]	[illegible]	[illegible]	[illegible]
[illegible] for the year	[illegible]	78,235	[illegible]	[illegible]	4,171	[illegible]

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	2	1,510	88	69,753	90	71,263
Swedish	592	45,592	1,213	400,349	1,805	445,941
Danish	148	6,595	1,197	207,563	1,345	214,158
German	63	4,874	90	26,835	153	31,709
Norwegian	35	7,590	25	11,280	60	18,870
Other countries ...	28	7,478	8	4,168	36	11,646
Total	868	73,639	2,621	719,948	3,489	793,587
,, for the year preceding ...	862	76,819	3,557	867,126	4,419	943,945

RETURN of Principal Articles of Export from Malmö during the Years 1893–92.

Articles.		Quantity.	
		1893.	1892.
Bacon and beef	Tons	2,864	3,043
Butter	,, ...	5,970	4,865
Cement	,, ...	4,635	8,359
Chalk	,, ...	9,027	7,929
Cheese	,, ...	92	94
Eggs	Scores ..	303,147	232,907
Grain and flour	Tons	19,768	19,118
Live stock	Number ..	13,879	29,924
Matches	Tons	3,664	5,484
Sugar and syrup	,, ...	3,689	2,911
Timber	Standards ..	3,790	4,633
Wood-pulp	Tons	2,659	2,788

RETURN of Principal Articles of Import to Malmö during the Years 1893–92.

Articles.		Quantity.	
		1893.	1892.
Bran	Tons	..	4,663
Cacao	,, ...	334	248
Coal and coke	,, ...	197,506	212,000
Coffee	,, ...	1,166	1,342
Cotton	,, ...	630	547
Feeding stuffs	,, ...	6,003	6,529
Grain and flour	,, ...	18,449	4,929
Iron, all kinds	,, ...	11,163	10,600
Machinery	Value £	74,901	15,240
Manure	Tons	9,011	..
Oils	,, ...	3,784	4,039
Salt	,, ...	4,394	1,559
Sugar and syrup	,, ...	5,401	2,627
Tobacco	,, ...	249	343
Wool and textiles	,, ...	1,585	1,120

YSTAD.

Mr. Vice-Consul Nilsson reports as follows:—

Trade generally. The trade and commerce of this port has not undergone any noticeable change from the previous year.

Exports. Butter. The direct export from this port of butter is decreasing since the dairies in the neighbourhood find it an advantage to send their produce by rail to Malmö and Helsingborg for shipment.

Bacon. The bacon cured at two bacon factories in this district is also exported by way of Malmö and Helsingborg.

Live stock. The import of Swedish cattle into Great Britain and Germany being prohibited, the export from this port of live stock has almost ceased, causing great loss to the farmers.

Imports. Sugar. It is expected that the import of sugar will gradually decrease after the completion of two factories for the production of beet-root sugar which are now being built in this district.

Customs. The customs duties levied at Ystad in 1893 amounted to 77,620*l.*, against 86,180*l.* in 1892.

Harvest. Hay, &c. On account of the drought during the spring and summer, followed by very rainy weather in the autumn, the crops of hay and clover, as well as of straw, turned out very insignificant.

Grain Roots. All crops of grain gave an average yield of good weight and colour. Beetroots and other roots produced an abundant crop.

Railways. Two railways, namely the Ystad-Gärsnäs and the Klagstorp-Rydsgård, are now being built in this district and expected to be opened to traffic in the course of 1894.

RETURN of all Shipping at the Port of Ystad during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total	
	Number of Vessels	Tons.	Number of Vessels	Tons.	Number of Vessels.	Tons.
British	2	295	9	4,096	11	4,391
Swedish	409	21,5[illegible]	325	[illegible]	734	128,[illegible]40
Danish	43	3,[illegible]84	90	12,[illegible]92	133	16,[illegible]76
Norwegian	13	1,[illegible]69	7	2,[illegible]30	20	4,[illegible]99
Other countries ...	40	4,[illegible]06	12	4,183	52	8,[illegible]89
Total	448	31,154	443	13[illegible],071	941	162,825
,, for the year preceding ...	381	25,[illegible]80	445	127,960	826	153,[illegible]40

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	2	295	9	4,696	11	4,991
Swedish	387	20,064	325	106,530	712	126,594
Danish	43	3,564	90	12,592	133	16,156
Norwegian	13	1,970	7	2,720	20	4,690
Other countries ...	39	4,658	12	4,133	51	8,791
Total	484	30,551	443	130,671	927	161,222
,, for the year preceding ...	389	25,774	445	127,960	834	153,734

RETURN of Principal Articles of Export from Ystad during the Years 1893–92.

Articles.		Quantity.	
		1893.	1892.
Butter	Cwts.	615	1,027
Flour	,, ...	40,266	51,060
Grain	,, ...	128,834	137,459
Sugar	Tons	3,601	3,904
Spirituous liquors	Gallons ..	22,295	46,550

RETURN of Principal Articles of Import to Ystad during the Years 1893–92.

Articles.		Quantity.	
		1893.	1892.
Bran	Tons	1,423	1,896
Coal and coke	,, ...	25,739	31,800
Flour	,, ...	43	21
Grain	,, ...	3,030	7,560
Iron	,, ...	2,332	995
Oil-cake	,, ...	1,458	1,706
Oils	,, ...	610	587
Sugar	,, ...	5,518	3,869

CARLSCRONA.

Mr. Vice-Consul Palander reports as follows :—

Trade generally.

The dulness that prevailed in trade and commerce of this port during the last 3 years continues unchanged.

Exports Oats.

Almost all the oats exported from this district are sent to Malmö for shipment to Copenhagen, and, consequently, does not

appear in the export list of this place. The quantity thus exported this year amounted to about 15,000 cwts.

Imports. Coal and coke. Grain. The import of coal and coke decreased considerably, whereas the import of grain was nearly double that of the preceding year.

Customs. The dues levied by the customs at this port amounted to 19,772*l.*, against 19,231*l.* in 1892.

Harvest. The crops raised were small, but of good quality. The prices of grain, which throughout the year were very low, have still a downward tendency.

Fisheries. The fishing on this coast has been very satisfactory, but the price of fish very low.

Harbour. The inner harbour is being extended and deepened.

RETURN of all Shipping at the Port of Carlscrona during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	2	999	2	999
Swedish	81	10,453	297	78,673	378	89,126
Norwegian	16	3,446	3	1,749	19	5,195
German	26	2,102	4	806	30	2,908
Danish	35	2,156	1	448	36	2,604
Other countries ...	12	1,747	1	697	13	2,444
Total	170	19,988	308	83,312	478	103,300
,, for the year preceding ...	216	21,238	371	95,312	587	116,550

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	2	999	2	999
Swedish	121	12,872	220	54,872	341	67,744
Norwegian	16	3,886	5	2,671	21	6,557
German	35	2,381	5	1,163	40	3,544
Danish	42	2,462	1	438	43	2,900
Other countries ...	11	1,873	...	...	11	1,873
Total	225	23,124	233	60,147	458	83,271
,, for the year preceding ...	275	24,479	298	74,708	573	99,457

RETURN of Principal Articles of Export from Carlscrona during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Granite	..	..	15,400	..	20,140
Oats..	Cwts. ..	3,339	835	..	..
Rails, old	Tons ..	..	..	1,825	3,650
Wood	Standards	7,275	32,737	1,669	37,545
Total	..	..	48,972	..	61,335

RETURN of Principal Articles of Import to Carlscrona during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Bacon	Cwts. ..	266	532	566	1,132
Brandy	Gallons ..	12,798	3,199	4,980	1,245
Coal and coke ..	Tons ..	17,314	12,120	25,306	17,714
Coffee	Cwts. ..	3,299	8,577	2,322	6,037
Grain	Tons ..	6,065	34,874	3,170	21,611
Iron and rails ..	„ ..	444	1,776	193	386
Machinery	..	..	1,000	..	1,736
Manure	Tons ..	2,614	3,921	955	1,433
Meal	Cwts. ..	1,300	975	3,620	1,629
Petroleum	„ ..	18,100	5,430	19,177	5,753
Salt	Tons ..	1,655	3,310	916	824
Sugar	Cwts. ..	1,341	2,682	1,568	3,136
Tobacco	„ ..	1,092	2,730	2,072	5,698
Total	..	..	81,126	..	68,334

NOTE.—1 ton = 1,000 kilos.; 1 cwt. = 50 kilos.; 1 gallon = $4\frac{544}{1000}$ litres; 1 standard = $4\frac{672}{1000}$ cubic metres; 1*l.* = 18 kronor.

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1894.

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TUNIS.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF TUNIS.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1293.

Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.

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TUNIS.

TUNIS.

Consul-General R. Drummond-Hay to the Earl of Kimberley.

My Lord, *Tunis, June* 15, 1894.

I HAVE the honour to enclose the Annual Report on the Trade of Tunisia for the year 1893.

I have, &c.

(Signed) R. DRUMMOND-HAY.

Report on the Trade of Tunisia for the Year 1893.

ABSTRACT of Contents.

	PAGE
Review of trade	1
Cotton tissue crisis	1
Imports and exports	2
Imports	3
Exports	6
Shipping and navigation	8
British steamship companies	10
New Port of Bizerta	11
Ports of Tunis, Susa, and Sfax	11
Sardine and anchovy fisheries	11
Changes in tariff of exports	11
Tunis-Bizerta railroad	11
City of Tunis improvements	12

Trade and Commerce.

The commercial crisis. The trade of Tunisia experienced an unprecedented crisis during the year 1893 in consequence of a succession of poor harvests in grain and oil, the main agricultural resources of the country.

British cotton tissue trade. The withdrawal of all credit by the banks was also a serious blow to commerce, and especially to those houses interested in the

British cotton tissue trade, who had been in the habit of obtaining credit from England on a very liberal scale. This condition of affairs led to numerous failures amongst the local firms, leaving only a limited number that have been able to withstand the shock.

The total loss to British commerce may be estimated at about 33,000*l.*

Prospects of a revival of trade.

There is, however, every prospect of an exceptionally fine harvest this year throughout the country, and of a general improvement in business. Many British firms hesitate to re-open accounts, which is not surprising after the occurrences of 1893; but confidence will be probably restored during the course of the year, and opportunities afforded of recuperating the losses by a revival of trade throughout the country in 1895.

Imports and Exports.

Annex A. Decrease in imports and exports.

The returns for 1893 show a diminution both in imports and exports, the former being valued at 1,535,329*l.*, against 1,572,905*l.*, and the exports at 1,187,413*l.*, against 1,488,100*l.* in the previous year.

The import trade with all parts of the world was more or less affected by the position of affairs in this country, as is evident from the following statement of the value of imports from the principal countries trading with Tunisia:—

STATEMENT showing Falling Off of Trade of Principal Countries.

Country.	Imports.	
	1892.	Decrease, 1893.
	£	£
Austria	63,659	13,795
Belgium	43,868	3,943
France and Algeria	937,553	4,003
Great Britain and Malta	230,670	21,868
Italy	180,918	22,944

The falling-off in the trade with Great Britain was mainly in Manchester goods; with Austria in spirits, alcohol, and wood goods; with Italy in wine, silk tissues, metal goods, &c.

British, German, and Swiss transit trade.

Amongst the imports quoted under France in the statistics there are articles of German, British, and Swiss origin that are imported in transit over Marseilles, and, for want of proper specification, are passed as French goods at the customs. This interferes with a true estimate of the trade, but it may be assumed that the comparatively small diminution in the value of the import trade

with that country was due to the large supplies of flour and grain shipped from Marseilles, valued at about 55,088*l.*, consequent upon the partial failure of the crops of the previous year. The falling-off in imports was otherwise more or less in equivalent proportions to those of other countries. Importation of grain and flour from Marseilles.

The values of the exports to each country are not specified separately in the statistics, but it may be gathered from the returns that the goods mostly affected were wheat, barley, oats, maize, esparto grass, oil, and pulse. The decrease, both in their volume and value, was caused by the drought in the southern districts of the Regency, which resulted in a partial failure of the grain and olive crops. Decrease in volume and value of exports.

The value of the trade was thus diminished by about 300,687*l.*, affecting chiefly France and Algeria, which monopolise the bulk of the agricultural products.

The aggregate value of the import and export trades during 1893 amounted to 2,722,742*l.*, being a decrease in comparison with the previous year of about 310,252*l.* in the trade with France and Algeria, and of about 24,015*l.* with other countries. Aggregate value of imports and exports.

Imports.

The importation of alcohol is valued in the returns at 23,664*l.*, a decrease of 5,162*l.* on the previous year, consequent on the fall in price during 1893 from 45 fr. to 32 fr. and 35 fr. Annex B. Alcohol.

The trade with France is valued at about 11,000*l.*, and with Austria at about 6,000*l.*

The import from Malta increased, on the other hand, from 3,535*l.* to 5,511*l.*

A considerable portion of the article imported from France is of German manufacture, and that from Malta is wholly Austrian.

An unusually large quantity of Russian barley was imported to meet the demand caused by over-exportation after a poor harvest. The value is estimated at 59,323*l.*, or 45,210*l.* in excess of the previous year. The principal shipments were from France, Algeria, and Malta. Barley.

The trade in china and pottery during 1893 is valued at 5,728*l.* British wares would compete successfully in this branch of trade if it were not for the risks incurred by transhipment at Malta. China and pottery.

A considerable portion of the articles imported from the latter place are of British manufacture.

Ordinary pottery is imported from Italy.

The coal imports decreased in value from 24,236*l.* in 1892 to 18,562*l.* in the following year. This was probably caused by the fact of ships of the Transatlantic Company having ceased coaling at Tunis. Coals.

The value of shipments direct from Great Britain is estimated at 8,792*l.*, to which may be added as of British origin the ship-

ments from Malta, valued at 592*l.*, and also about 3,000*l.* from Algeria emanating from the British coal depôts at that port.

French coal was imported to a value of about 5,000*l.*, and Belgian coal was also shipped from Antwerp by the Danish steamers that call at Tunis to a value of about 800*l.*

Coffee. The coffee imports, valued at 30,465*l.* in 1892, are quoted at 34,219*l.* in the returns of the following year. The greater portion of the trade is divided between France and Italy—18,885*l.* to the share of the former, and 14,567*l.* to that of the latter.

Cotton tissues. My report for 1892 showed that the trade in cotton goods had decreased in value from 336,984*l.* in the previous year to 193,158*l.* In the accompanying returns for 1893 the figures have fallen to 156,614*l.*, evidence of the effects of the crisis in this important branch of trade.

Comparison with previous year's returns. A comparison of the statistics for 1892 and 1893 shows that the value of the trade with Great Britain in goods shipped viâ Malta, amounting to 98,921*l.*, was a decrease of about 12,132*l.* on the previous year, while the direct consignments, valued at 16,762*l.*, show a decrease of 20,882*l.*

The aggregate value of the imports from Great Britain, direct and viâ Malta, amounted to 115,683*l.*, being a diminution of about

French cotton tissues. 33,014*l.* on the value of the trade of 1892. The French article, on the other hand, valued at 29,999*l.*, is slightly in excess of the previous year by about 920*l.*

The trade with Algeria, Italy, and Belgium. The imports from Algeria valued at 2,903*l.*; from Italy at 4,038*l.*; and from Belgium at 1,638*l.*: have all fallen off more or less in comparison with the returns for 1892.

Dried fruits. The dried fruit imports are entirely from France, Algeria, and Italy. The value of the trade with the two former countries is estimated at about 5,254*l.*, more than doubling that with Italy.

Furniture. Furniture is imported from France and Italy in about equal quantities, besides some shipments from Trieste by the Austrian line of steamers.

The total value for 1893 is estimated at 8,276*l.*, being 1,954*l.* less than the previous year.

Glassware The value of glassware is estimated at 10,475*l.* Articles comprised under this heading are chiefly French manufactures.

Hides and skins The trade in tanned hides and skins, estimated at 43,328*l.*, shows a gradual falling-off during late years. This may be attributed to an increase in the importation of shoes and other manufactured leather goods.

Iron and steel (including rails). Iron and steel imports are valued at 47,897*l.*, a considerable augmentation on the returns of the previous year amounting to 17,618*l.*

The bulk of the goods were of French and Belgian origin, and included a quantity of rails and other articles required for the construction of the Tunis-Bizerta railroad.

Iron girders, bar iron, and articles for building purposes are largely imported from Belgium.

Linen and hemp textures. There was a considerable falling-off in linen and hemp goods from 14,124*l.* in 1892, to 7,269*l.*, affecting principally the trade with France.

Some quantities also of British manufacture are imported from Malta, consisting especially of jute.

Machinery. The increase in the value of machinery from 17,735*l.* to 23,070*l.* may be partly attributed, as in the case of iron and steel, to the requirements of the new railroad and the Port of Bizerta.

Metal goods. The general depression in trade caused a marked decrease from 140,900*l.* to 96,043*l.* in the return of metal goods. Dealings under this heading exist with several countries, including Malta, in articles of British manufacture, but the bulk of the trade is with Marseilles.

Mineral oils. The trade in mineral oils, valued at 12,387*l.*, consists principally in consignments of Russian oils valued at 8,000*l.*

The remainder was chiefly American oils from Malta and Italy.

Semolina. In consequence of the scarcity of breadstuffs in the country there was an increase in the importation of semolina, valued at 165,716*l.*, emanating principally from France.

Silk tissues. The trade in silk tissues, which includes many articles for native use, suffered from the stagnation in business after a poor harvest, and fell in value from 18,272*l.* to 8,967*l.*

Silks, raw, milled, and dyed. The same may be said of silks, raw, milled, and dyed, estimated at 23,224*l.*, against 42,350*l.* in the previous year.

Sugar. There was an increase of 3,398*l.* in the sugar import, valued at 80,759*l.*

The trade in this article is divided entirely between Austria, France, and Malta, as follows:—

Country.	Value.
	£
Austria	21,253
France	36,821
Malta	20,488

On deducting the returns of the raw article from the above, the value of refined sugar amounts to about 66,618*l.*, equally divided between those countries.

The article imported from Malta is of Austrian manufacture.

Timber for building purposes. Wood goods for building purposes were imported at a value of about 19,000*l.* from Sweden and Norway, 13,967*l.* from Austria, besides smaller shipments from France, Italy, Malta, and other countries. The total value of the trade amounts to 42,142*l.*, a decrease of about 5,760*l.* on the importation of the preceding year.

Wearing apparel. Wearing apparel, linen goods, and other made-up fabrics, valued at 27,817*l.*, are imported chiefly from France.

Wheat. The scarcity of wheat after a partial drought preceded by 2 years of shipments to France of grain to the value of 956,378*l.*, occasioned a demand for the article and an importation to the value of 85,214*l.* The returns of the previous year amounted only to 12,005*l.*

Wines. The import trade in wines continues to decrease with the development of the native industry, as predicted in my previous reports.

The returns for 1893 are valued at 36,741*l.* The shipments from Italy, the most interested country in this trade, are estimated at 24,260*l.*, and the imports from France and Algeria at about 11,634*l.*

Woollen fabrics. The trade in woollen fabrics shows a gradual falling-off during the past 3 years from 47,282*l.* in 1891 to 34,080*l.* in 1893.

This article is imported from France, Algeria, Italy, and Malta.

The shipments from Marseilles, valued at 24,164*l.*, contain goods in transit from other countries, including Great Britain.

Yarn. Yarn, valued at 19,376*l.*, against 20,904*l.* in the previous year, is imported from Belgium, Italy, France, and Malta in equal quantities. The article from the latter country and a portion of the imports viâ Marseilles are of British origin.

Exports.

Barley. A comparison of the returns of 1893 with those of the two previous years, shows a decrease both in the volume and value of barley exported from the Regency from 360,650 qrs. at 327,864*l.* in 1891, to about 100,000 qrs. at 92,752*l.* in 1893, which may be attributable to the partial drought prevalent during that period.

This trade consists almost entirely of direct shipments to Marseilles.

Cattle. The number of cattle exported during 1893 amounted to 21,073 head, valued at 50,119*l.*, of which 15,159 head went to France and Algeria, 4,655 head to Malta, and 1,188 head to Italy.

The two latter countries import only bullocks, and the trade with Algeria is chiefly in sheep, of which there were 12,307 head that crossed the frontiers.

The scarcity of pasturage, consequent on a dry season, may be regarded as the principal cause of the comparatively large exportation of cattle.

Dates. Dates are mostly exported to France and Malta. The shipments during 1893 amounted to 1,802 tons, valued at 21,360*l.*, against 929 tons, valued at 12,923*l.* in the previous year.

The species of dates best known in the market are the Degla, Horra, Bser, and Gabes.

The two first named represent the finer qualities usually exported to Europe, packed with the fruit attached to the stalk in small boxes. The others enter the native markets throughout North Africa, and amongst them there is a dry date of a sweet flavour with the crisp substance of a biscuit, preferred by the Arabs to all others, as they can be kept longer in storage, and are very convenient for long journeys.

Cork. Cork was exported to Italy, 297 tons; and to France and Algeria, 83 tons, making a total of 380 tons, valued at 2,813*l.*

Esparto grass. The esparto grass exports, estimated in the returns for 1892 at

19,205 tons of 76,820*l.* value, show a decrease in volume of 7,025 tons, and in value of 21,377*l.*

The trade continues to be monopolised by Great Britain, but, as already mentioned in my previous report, it will never develop itself so long as the onerous duty of 10*s.* 2*d.* per ton is maintained by the Government.

Fez caps, valued at 16,150*l.*, are exported to Algeria, Tripoli, and other Mussulman countries. Fez caps.

The Tunisian article is well known for its superiority of texture and durability.

Fish was exported exclusively to Italy, amounting to about 728 tons, valued at 11,653*l.*, a considerable decrease on the returns of the foregoing year, valued at 22,585*l.* Fish.

Hides and skins amounting to 900 tons were shipped chiefly to France and Italy, and valued at 43,912*l.*, showing an increase of 11,665*l.* on the returns of 1892. With a few small exceptions the shipments were to France and Italy. Hides and skins.

The exportation of horses and mules has steadily increased during the past 3 years. The trade was valued in 1891 at 3,615*l.*, and has now reached 9,851*l.* Horses, mules, &c.

Horses numbering 873 were exported to Italy, Malta, and Algeria. Mules and asses numbered 344 head.

Minerals are assuming an important place in Tunisian articles of export. Minerals,

5,234 tons of zinc were shipped during the year, 3,598 tons to Belgium; 1,478 tons to Great Britain; and 157 tons to France; aggregate value, 20,934*l.* The shipments in 1892 were estimated at 9,806*l.*, and in the previous year, when the trade was first started, at 187*l.* Zinc.

A small consignment of lead to France also took place. This article of export, which has prospects of development, was not specified in the returns of 1892. Lead.

The trade in olive husks, which attained a value of 16,545*l.* in 1892, figures only for 457*l.* in the accompanying return. The cause of this sudden check in the exportation may be attributed in a certain measure to an inferior olive crop, and also to the fact that certain oil refiners in the Regency have succeeded in producing an oil from the husks suitable for machinery. Olive husks.

The quantity of olive oil shipped from Tunisian ports during the year amounts to 4,247 tons, valued at 145,929*l.*, which, compared with the exportation of 1892, estimated at 316,808*l.*, shows a considerable falling-off. Olive oil.

The orange export returns show 220 tons, valued at 1,764*l.*, with principal shipments to Sicily. Oranges and limes.

The partial failure of the bean and pea crops resulted in a greatly reduced exportation, amounting to 1,743 tons, valued at 41,835*l.* The bulk of this article is shipped to France. Pulse.

Woollen tissues are exported to Algeria, Turkey, Egypt, Trieste, and Malta. This trade was valued in 1893 at 20,342*l.*, against 19,646*l.* in the previous year. Woollen tissues.

A comparison of the tunny exports for the past 2 years shows Tunny.

a marked improvement in the trade, valued at 28,082*l.*, against 9,312*l.* in 1892.

Sponges. Sponges weighing 110 tons and valued at 50,591*l.* were exported mainly to France. The trade in this article during the previous year was valued at 38,450*l.*

The vessels employed in the sponge fisheries were of Italian, Greek, and Tunisian nationalities, and numbered 1,222 of 2,892 aggregate tonnage.

These fisheries have made steady progress during the past 3 years, and promise, under the regulations that are now in force, to become a flourishing industry.

Tan. The exportation of tan, referred to in my last report as capable of great development, amounted to 6,116 tons, valued at 146,804*l.*, an augmentation of 46,840*l.* on that of the previous year.

The largest shipments of this article were to Italy, amounting to 3,815 tons. Considerable quantities were also exported to Great Britain and Algeria.

Wine. Notwithstanding an average grape harvest, there was a slight diminution both in the volume and value of the wine exports from about 1,187,550 gallons at 47,918*l.*, to 1,121,525 gallons at 45,030*l.* in 1893. This was occasioned by the low prices reigning in the French market after an abundant production in that country.

Shipping and Navigation.

Annex C. Number and tonnage of vessels. The number of vessels that entered the ports of the Regency during 1893 amounted to 9,171, with an aggregate tonnage of 1,828,998 tons.

Compared with the previous year this shows a decrease of 205 ships and 54,044 tons.

British shipping. British shipping was represented by 140 vessels of 86,368 tons; a slight improvement on the returns of 1892 by 14 vessels and 8,436 tons.

The general shipping is mainly in French and Italian hands, the tonnage of the former amounting during 1893 to 1,026,685 tons, and of the latter to 610,139 tons.

Chief ports of call. The chief points of call are Goletta, Tunis, Sfax, and Susa, which together monopolise more than half the tonnage.

The total number and tonnage of ships, merchandise, and cattle entered and cleared during 1893 were as follows:—

STATEMENT of Shipping, Merchandise, Passengers, and Cattle.

Description.		Quantity.
Ships	Number ..	18,254
Tonnage	Tons	3,654,545
Merchandise	„	343,615
Passengers	Number ..	102,613
Horses, cattle, &c.	„ ..	9,244

On deducting from these figures the number and tonnage of sailing vessels estimated at 13,873 ships of 208,852 tons, the steamship navigation stands at 4,381 ships of 3,445,693 aggregate tonnage.

A comparison of the number, tonnage and merchandise of British, French, and Italian steamships entered and cleared shows the following results :—

COMPARISON of British, French and Italian Shipping and Merchandise.

Nationality.	Number of Vessels.	Tonnage.	Merchandise.
British	164	166,072	29,483
French	2,702	2,047,331	139,737
Italian	1,571	1,115,233	15,514

Nationality.	Average Tonnage of Ships.	Average Quantity of Merchandise per Ship.
		Tons.
British..	1,012	179
French	765	51
Italian..	609	9

French steamship companies.

Regular steamship communication with the ports of the Regency is kept up by the French Compagnie Générale Transatlantique, whose steamers ply between Marseilles and Tunis three times a week. They also make two weekly tours of the southern ports, the first starting viâ Malta and Tripoli, and the other in the adverse direction. These ships are subsidised by the French Government, and have good passenger accommodation.

The other French companies engaged in the Tunisian trade are "La Société Générale des transports Maritimes," "Compagnie de Navigation Mixte," "Compagnie des Bateaux à Hélice du Nord," and the "Compagnie de Havraise Péninsulaire."

Italian line.

The ships of the Italian line Florio Rubattino, leave Genoa

weekly viâ Leghorn and Cagliari for Tunis, the coast of Tripoli and Malta, and for Palermo viâ Marsala, Trapani, and Pantelleria, returning by the same routes.

Danish line.

The Danish steamers belonging to the "Det Forenede Dampskibs Selskab Company," after calling at Antwerp, touch at Tunis monthly and proceed to the Piræus.

Austro-Hungarian line.

The Austro-Hungarian Adria line of steamers ply bi-monthly between Trieste and Tunis, visiting Messina and Malta.

Belgian line.

A Belgian steamship company has also lately started a regular monthly service between Antwerp and Tunis.

British steamship companies.

Messrs. Gollcher and Sons, of Malta, have established regular steamship communication between that Island, Trieste, and Tunis.

Regular steamship communication with British ports.

Messrs. Knotts' Prince line of steamers, referred to in my last report as having opened regular steamship communication between Great Britain and Tunis, will probably send boats this year from Manchester to Tunis every 14 days, calling occasionally at Algiers.

Prospects of a Manchester-Tunis line.

This arrangement will not interfere with their services, Hamburg, Antwerp, Tunis and Antwerp, London, Tunis.

Tunis new port shipping.

The ships that entered the new Tunis basin since the opening of the canal on June 1, 1893, numbered 323 steamships and 225 sailing vessels of 237,109 aggregate tonnage with 70,842 tons of merchandise, and the departures were 317 steamships and 223 sailing vessels, of 231,939 aggregate tonnage with 31,632 tons of merchandise.

Entry to Tunis of Italian company's steamers.

The Italian Steamship Company Florio and Rubattino, who continued to load and discharge at Goletta, have now decided to take advantage of the new port, and made their first entry on April 23 of this year.

Contract with Tunisian Government to complete Tunis port.

The completion of the works of the port has been confided by the Tunisian Government to Messrs. Alexis Duparchy and Simon Préault, a French firm, who have also undertaken to construct new ports at Susa and Sfax.

Construction of new ports at Susa and Sfax.

According to the terms of the concession, the Tunisian Government has made over to the concessionaires the three ports with all their movable and immovable appurtenances.

Terms of agreement.

Capital.

The capital of the company will be 120,000*l.*, which may be increased by order of the Government to an additional equivalent sum.

Caution money.

The caution money is fixed at 40,000*l.*, to be deposited in the Tunis Treasury as a security for the completion of the works.

Guarantee.

On the other hand, the Government guarantees an annual revenue from the ports of 16,000*l.* to be paid at the termination of the works of each port in the following proportion:—

Port.	Value.
	£ s.
Tunis	5,443 4
Sfax..	7,646 8
Susa..	3,110 8
Total	16,200 0

The right of sale of a portion or the whole of the land is reserved by the Government, the concessionaires obtaining one-third and the Government two-thirds of the proceeds.

The new Port of Bizerta.

The works of the new port of Bizerta have made fair progress during the past year.

Progress of Bizerta Port works.

The northern breakwater of the outer harbour, measuring about 1,000 meters, has been completed and the eastern jetty, which will attain nearly the same dimension, has reached half its length.

First ship to enter the lake through the new canal.

On March 17 of this year a French steamship "La Ville d'Alger," chartered by the port company passed through the canal and moored inside the lake.

This ship of 2,200 tons was the first to enter the new port since the construction of the canal, which already exceeds 8 meters in depth.

Opening of the port and railroad, 1895.

The port will probably be opened to navigation simultaneously with the completion of the Tunis-Bizerta railroad in 1895.

Fisheries.

Sardine and anchovy fisheries.

The sardine and anchovy fisheries are found on the coasts of Tabarca, Susa, and Mehdia, and in the Gulf of Tunis.

The most important are the Tabarca, where 110 smacks are engaged in the trade, of which 95 are of Italian and 10 of French nationality.

The fishing fleet.

The total fishing fleet on the whole coast numbers 242 boats of 1,476 tons.

Yield of fisheries.

The yield of the sardine fisheries last year at Tabarca and Susa amounted to 338,650 kilos. valued at 3,696*l.*, and of the anchovy in the Gulf of Tunis and Tabarca at 393,640 kilos. valued at 9,909*l.*

The yield at Mehdia of a species called "Allaches" was 184,410 kilos. valued at 10,680*l.*

The produce of all other fisheries along the Tunisian coasts during 1893 amounted to 1,966,715 kilos. valued at 33,644*l.*

Changes in Tariff.

Reduction of export duty on tunny.

The export duty of 6 fr. 22 c. per quintal on tunny was reduced by a decree, dated November 30, 1893, to 97 c. per quintal, levied hitherto only on salt fish. The latter duty was also extended to the exportation of dried, smoked, and pickled fish.

Railroads.

Railroad to Bizerta.

The railroad which will connect the port of Bizerta with Tunis by a branch from Djedeida on the Medjerda main line, referred to in my report, No. 296, Miscellaneous, of June 29, 1893, on the

railway system in Tunisia, has now made considerable progress, having reached the town of Mater, about half the distance between the new junction and Bizerta.

Scheme for railway communication with principal towns.

The convention between the Tunisian Government and the Bone-Guelma Railway Company for the construction of the several lines connecting Tunis with the principal southern seaports and Kairwan is still awaiting ratification by the French Parliament. This has been the chief cause of the long delay in the realisation of these promising schemes for the development of the rich resources of the country.

Public Works.

European quarter in Tunis.

The European quarter that has sprung up outside the old Arab city, since the establishment of the protectorate, is fast assuming under the management of the municipality the appearance of a well built European town.

Projected public buildings.

The construction of a large casino, including a first class hotel and a theatre, will be shortly commenced, and projects are under consideration for the erection of an hospital, which is greatly needed by the town.

Botanical Gardens.

A considerable tract of land has also been secured by the municipality in a picturesque neighbourhood of the town, where botanical gardens are being laid out, which in due course of time will form an agreeable suburb of Tunis.

Annex A.—TABLE showing Total Value of all Articles Imported to, and Exported from, the Regency of Tunis, from and to Foreign Countries, during the Years 1893–92.

Country.	Imports.		Exports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain and Malta	208,803	230,671	123,138	142,734
France and Algeria ..	933,550	937,553	776,549	1,082,794
Italy	164,474	186,918	181,612	123,911
Austria	49,864	63,659	5,899	2,958
Belgium	39,925	43,868	18,633	12,707
Other countries ..	138,713	110,236	81,582	122,996
Total	1,535,329	1,572,905	1,187,413	1,488,100

Annex B.—RETURN of Principal Articles of Import into the Regency of Tunis during the Years 1893-92.

Articles.	Value.	
	1893.	1892.
	£	£
Alcohol	23,664	28,826
Barley	59,323	14,113
Building materials	31,199	31,970
China and pottery	5,728	7,144
Coals	18,562	24,236
Coffee	34,219	30,465
Cotton tissues	155,614	193,158
Drugs	13,116	14,522
Fish, preserved	5,201	4,911
Fruit, dried	7,963	12,001
Furniture	8,276	10,230
Glassware	10,475	12,122
Hides and skins, tanned	34,159	43,328
Iron and steel (including rails)	47,897	17,615
Leather goods	11,658	10,833
Linen and hemp textures	7,269	14,124
Machinery	23,070	17,735
Marble	5,358	4,657
Metal goods	96,043	140,900
Oils, mineral	12,387	13,551
Pepper	4,338	5,693
Potatoes	9,301	9,092
Semolina	165,716	133,412
Silk tissues	8,967	18,272
Silks, raw, milled, and dyed	23,224	42,350
Sugar, raw and refined	80,759	77,361
Timber for building purposes	42,142	47,902
Wearing apparel	27,817	23,363
Wheat—		
Grain	85,214	12,005
Flour	44,305	50,956
Wines	36,741	43,133
Woollen fabrics	34,080	47,282
Yarn	19,376	20,904
Sundries	342,168	394,739
Total	1,535,329	1,572,905

RETURN of Principal Articles of Export from the Regency of Tunis during the Years 1893–92.

Articles.		Quantity.	Value.	
		1893.	1893.	1892
			£	£
Barley	Tons ..	100,000	92,752	176,318
Butter	.. ..	17	1,341	1,416
Cattle	Number ..	21,073	50,119	14,959
Cork	Tons ..	380	2,813	4,877
Dates	,, ..	1,802	21,300	12,723
Esparto grass	,, ..	13,861	55,443	76,820
Fez caps	..	..	16,150	17,111
Fish	Tons ..	728	11,653	22,485
Hides and skins ..	,, ..	909	43,912	32,247
Horses, mules, &c. ..	Number ..	1,217	9,851	7,828
Indian corn	..	..	..	1,314
Minerals—				
Lead	Tons ..	9	38	..
Zinc	,, ..	5,234	20,934	9,896
Oats	,, ..	439	2,630	3,506
Olive husks	,, ..	228	457	16,545
,, oil	,, ..	4,247	145,929	346,808
Oranges and limes ..	,, ..	220	1,764	2,430
Pulse	,, ..	1,743	41,835	117,178
Rags	,, ..	353	1,412	1,063
Soap	,, ..	225	3,607	3,904
Sponges	,, ..	111	50,591	38,450
Tan	,, ..	6,116	146,804	90,964
Tissues—				
Silk	..	..	3,701	5,570
Woollen	..	..	26,342	19,046
Cotton	..	..	6,302	7,377
Tunny	Tons ..	401	28,082	9,542
Wax	,, ..	71	5,007	4,993
Wheat	.. ..	21,762	206,213	320,498
Wine	Gallons ..	1,121,525	45,930	47,918
Wool	Tons	530	17,970	7,720
Sundries	..	..	139,071	87,004
Total	..	..	1,187,413	1,488,100

Annex C.—Return of Shipping at the various Ports of the Regency of Tunis during the Year 1893.

Entered.

Nationality.	Tabarca.		Bizerta.		Goletta.		Susa.		Monastir.		Mehdia.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	...	...	56	35,436	16	8,341	12	1,101	...	...
Tunisian	26	249	115	1,266	181	2,265	501	3,977	180	1,349	609	3,453
Austrian	1	287	...	...	18	10,241	...	...	...	...	8	648
French	171	66,316	137	81,930	498	343,561	136	103,494	112	88,483	106	85,321
Greek	...	...	...	...	9	5,296	1	380	...	...	...	...
Italian	117	8,725	105	5,472	525	139,148	243	81,374	115	74,554	132	75,590
Other countries	...	...	5	1,337	56	42,176	10	2,660	1	327	2	58
Total...	315	75,577	362	90,005	1,343	578,123	907	200,226	420	165,814	857	165,070
,, 1892	213	10,479	329	89,259	1,332	547,758	1,170	247,685	534	183,870	896	181,190

Nationality.	Sfax.		Skira.		Gabes.		Gerba.		Other Ports.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	25	12,817	14	17,628	10	10,405	1	51	6	589	140	86,368
Tunisian	2,028	7,964	243	1,769	453	2,386	506	5,054	906	5,008	5,748	34,740
Austrian	3	1,300	...	...	...	...	...	...	...	...	30	12,476
French	110	87,531	1	9	104	84,325	104	85,715	...	...	1,479	1,026,685
Greek	4	1,691	...	...	2	732	1	45	...	...	17	8,144
Italian	190	76,992	2	530	121	74,418	104	72,371	13	465	1,667	610,139
Other countries	10	3,841	...	...	...	...	...	...	6	47	90	50,446
Total...	2,370	192,136	260	19,936	690	172,266	716	163,736	931	6,109	9,171	1,822,998
,, 1892	2,136	218,891	209	19,673	682	204,442	695	177,761	1,229	11,724	9,376	1,883,042

(78 7 | 04—H & S 1897)

Return of Shipping at the various Ports of the Regency of Tunis during the Year 1893 —continued.

Cleared.

Nationality.	Tabarca.		Bizerta.		Goletta.		Susa.		Monastir.		Mehdia.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons
British	...	...	...	...	53	35,286	17	9,486	12	1,101	...	...
Turkish	26	249	116	1,286	178	2,200	498	3,981	176	1,326	609	3,463
Austrian	1	287	...	...	17	[illegible]	...	...	...	...	8	648
French	165	66,284	139	82,309	484	340,737	137	104,269	112	88,483	106	85,321
Greek	...	...	...	...	8	4,848	...	...	...	...	...	...
Italian	113	8,497	101	5,353	515	138,788	240	60,806	115	74,554	132	75,590
other countries	...	...	5	1,614	56	41,646	10	2,660	1	327	52	58
Total	305	75,317	361	90,562	1,311	575,457	902	261,202	416	165,791	857	165,080
„ 1892	291	10,292	276	87,504	1,320	543,803	1,108	247,778	534	185,873	894	181,153

Nationality.	Stax		Skira		Gabes.		Gerba		Other Ports.		Total.	
	Number of Vessels	Tons.	Number of Vessels.	Tons.	Number of Vessels	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	25	12,[illegible]17	14	17,028	12	11,592	1	51	6	589	140	88,620
Turkish	2,022	7,928	240	1,763	450	2,326	492	5,014	898	4,945	5,706	34,471
Austrian	3	1,[illegible]	...	...	...	...	...	...	..	...	29	12,187
French	111	87,[illegible]46	1	9	104	84,326	104	85,715	...	...	1,463	1,024,992
Greek	2	935	...	...	2	732	1	45	...	...	13	6,560
Italian	191	74,[illegible]00	2	530	121	74,418	103	72,854	13	468	1,646	608,810
other countries	7	3,655	...	...	...	...	...	...	6	47	137	50,007
Total	2,361	191,130	257	19,330	689	173,363	701	163,679	923	6,046	9,083	1,825,547
„ 1892	2,168	217,[illegible]42	209	19,673	682	204,442	696	177,761	1,229	11,724	9,376	1,883,042

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1894.

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1235.	Ningpo	1d.
1236.	Mannheim	1d.
1237.	Dunkirk	1d.
1238.	Macao and Timor	1d.
1239.	Madrid	½d.
1240.	Port-au-Prince	2d.
1241.	Frankfort	3d.
1242.	Erzeroum	1d.
1243.	Palermo	3½d.
1244.	Naples	1d.
1245.	Guatemala	1d.
1246.	Madrid	1d.
1247.	Gothenburg	2d.
1248.	Brindisi	2½d.
1249.	Fiume	2d.
1250.	Leghorn	2½d.
1251.	San Francisco	5½d.
1252.	Bushire	2d.
1253.	Nagasaki	1d.
1254.	Smyrna	1d.
1255.	Yokohama	1½d.
1256.	Stockholm	1½d.
1257.	Lisbon	1½d.
1258.	Tientsin	1d.
1259.	Port Said	1d.
1260.	Hiogo and Osaka	2½d.
1261.	Damascus	1d.
1262.	Samoa	½d.
1263.	Rio Grande do Sul	2½d.
1264.	Jeddah	1d.
1265.	Vienna	3d.
1266.	Shanghai	3d.
1267.	Bangkok	1½d.
1268.	Meshed	1½d.
1269.	Cadiz	2d.
1270.	Cherbourg	1d.
1271.	Erzeroum	½d.
1272.	Christiania	5d.
1273.	Buda-Pesth	½d.
1274.	New York	3d.
1275.	St. Petersburg	7½d.
1276.	Alexandria	1½d.
1277.	Tokio	2½d.
1278.	Bilbao	3½d.
1279.	Beyrout	6d.
1280.	Pekin	2½d.
1281.	Salvador	1d.
1282.	Malaga	4d.
1283.	Buenos Ayres	8½d.
1284.	Canton	1d.
1285.	Washington	4½d.
1286.	Warsaw	½d.
1287.	Pekin	½d.
1288.	Amsterdam	1d.
1289.	Manila	2½d.
1290.	Bahia	1d.
1291.	Munich	1d.
1292.	Trieste	1½d.
1293.	Tunis	4d.
1294.	Montevideo	1½d.
1295.	Belgrade	2d.
1296.	Teneriffe	1d.
1297.	Stettin	3d.
1298.	Rome	2½d.
1299.	Dantzig	7d.
1300.	Sofia	2½d.
1301.	Mexico	1½d.
1302.	Paris	1d.
1303.	Buenos Ayres	½d.
1304.	Tangier	2½d.
1305.	Somali Coast	½d.
1306.	Porto Rico	1d.
1307.	Paramaribo	1d.
1308.	Oporto	1½d.
1309.	Naples	½d.
1310.	Salonica	2½d.
1311.	Valparaiso	2d.
1312.	Mozambique	1d.
1313.	Odessa	1½d.
1314.	Honduras	2½d.
1315.	Batoum	4d.
1316.	Quelimane	1d.
1317.	Copenhagen	1d.
1318.	Lima	1d.
1319.	New York	1d.
1320.	Baghdad and Bussorah	1d.
1321.	Rio de Janeiro	3d.
1322.	Réunion	3½d.
1323.	Berne	1d.
1324.	Kiukiang	½d.
1325.	Resht	3½d.
1326.	Florence	1d.
1327.	Hakodate	1d.
1328.	Paris	2d.
1329.	Paramaribo	1½d.
1330.	St. Petersburg	2½d.
1331.	Patras	1½d.
1332.	Calais	2½d.
1333.	Luanda	1d.
1334.	Bordeaux	2½d.
1335.	Taganrog	1d.
1336.	Galveston	8½d.
1337.	Riga	2d.
1338.	Batavia	1½d.
1339.	Boston	1½d.
1340.	Baltimore	1½d.
1341.	Havre	2½d.
1342.	Vera Cruz	1d.
1343.	Saigon	1½d.
1344.	Stockholm	2d.
1345.	Galatz	1½d.

No. 1346.

Reference to previous Report, Annual Series No. 1173.

TURKEY.

TREBIZOND.

Consul Longworth to the Earl of Kimberley.

My Lord, *Trebizond, March* 12, 1894.

I HAVE the honour to transmit herewith my Report on the Trade and Commerce of the Trebizond Vilayet for the year 1893.

I have, &c.

(Signed) HY. LONGWORTH.

Report on the Trade and Commerce of the Trebizond Vilayet for the Year 1893.

ABSTRACT of Contents.

	Page
Trade and commerce	1
Shipping and navigation	4
Agriculture	4
Population and industry	5
Public works	6
General remarks	6
Tables	8–14

Trade and Commerce.

General trade

Trade during the year was once more crippled by abnormal causes. Scarcity in the interior and quarantine along the coast hampered business transactions during the last months. Notwithstanding such obstacles, however, 1893 compares favourably with the equally bad year of 1892, showing as it does at Trebizond an increase of 229,065 cwts. (39,760*l.*) in general trade, or 252,305 cwts. (66,345*l.*) in that of Anatolia; a decrease being observable in goods affecting Persia to the extent of 23,240 cwts. (26,585*l.*). The average of former years (1884–91)

represents 1,260,920 cwts. (2,129,000*l.*), or in other words a preponderance of 68,000 cwts. (196,100*l.*). The other ports of the vilayet were also commercially depressed. Samsoon in particular having suffered greatly from political disorders in the inland districts which reduced its trade from 1,683,615 cwts. (1,694,385*l.*) in 1891 to 1,017,855 cwts. (1,142,615*l.*) in 1893.

Exports. Exports show a rise of 52,485 cwts. (87,435*l.*) which does not come up to former years, and is almost entirely in favour of sheep, tobacco, and provisions.

Beans. Decrease in haricot beans by 12,640 cwts. (6,405*l.*) is attributable to bad crops from climatic causes along the coast, coupled with low prices in Europe. None were shipped to British ports, while France received 10,240 cwts. against 2,500 cwts. in 1892.

Sheep. Increase in sheep by 36,730 heads is explained as due to owners in Kurdistan having discovered the long journey to the railway station at Angora as injurious to the animals though advantageous to themselves.

Fruits, &c. Increase in fruits and vegetables, especially the juicy pears and apples of Gumush-Khaneh, and the hardy ones of Yomurah, is to be observed with the remark that they have been for the first time sent to Egypt and even to France.

Nuts. Increase in nuts by 2,395 cwts. (4,915*l.*) is seen, though the crops were of inferior quality and quantity. One-third of the hazel-nuts from here, and two-thirds from Kerassond were exported shelled to gain on freight and manipulation, but such as remained long unsold in Europe decayed to the loss of exporters. Other than those of Spain and Italy, the nuts of these parts are found superior and fetch higher prices in Europe. Compared with the preceding year, the shipments from Trebizond were 552 cwts. against 14,330 cwts., to the United Kingdom; 22,480 cwts. against 4,370 cwts., to Russia; 1,540 cwts. against 4,912 cwts., to France; 1,752 cwts. against 8,152 cwts., to Italy; while Austria, Turkey and other countries received quantities nearly equal to those of 1892.

Hides, &c. Increase in hides and skins by 3,515 cwts. (12,655*l.*) is due mainly to contracts with French firms for the supply of goat-skins.

Eggs, &c. Increase in provisions by 6,445 cwts. (13,860*l.*) is apparent; consisting chiefly of eggs and butter, the former article of which reached 1,050 cwts. for England against 45 cwts. in 1892, and for France 1,430 cwts. against 2,004 cwts.

Tobacco. Increase by 5,415 cwts. (11,636*l.*) appears in tobacco, which, though abundant, could not be dried to a bright colour, owing to autumnal rains and cloudy skies. None have been shipped to England; Cyprus received 660 cwts.; Egypt, 20,000 cwts.; and Holland, 5,430 cwts.

Persian exports. A diminution in volume by 15,055 cwts. and an augmentation in value by 11,385*l.* are observable in Persian exports. Compared with former years the fall-off in quantity stands at 50,000 cwts.,

affecting chiefly tumbeki and dried fruits. The rise in value is due to a greater export of silk stuffs and carpets.

Imports. The imports at Trebizond show a general increase of 191,635 cwts. (40,940*l.*) for Anatolian, and a decrease of 8,185 cwts. (37,970*l.*) for Persia. Grain and flour imported for the relief of famine stricken districts in the interior, helped materially to produce a rise in imports for home consumption.

Cotton goods. Increase by 1,715 cwts. (9,310*l.*) in cotton goods is exclusively in favour of Great Britain. Russia has in vain endeavoured to cope in this with Manchester, as the prints, though of better quality and faster colour, are too narrow for them to become marketable here at the present higher exchange of the rouble.

Copper. Increase in copper by 1,120 cwts. (3,360*l.*) is to the advantage of Belgium and Sweden, which offer greater facilities than England to local importers.

Hardware. Increase of hardware in quantity but not in value is noticeable, as larger supplies of cheap nails and machinery from Belgium and Germany were brought into the country.

Iron. Increase in iron by 4,930 cwts. (4,490*l.*) is also observable, furnished mainly by Belgium and Sweden.

Sugar. Russian sugar has entirely disappeared, and the markets of Asia Minor are now supplied by those of France and Austria.

Tea. Increase in tea by 2,045 cwts. (6,645*l.*) is to the benefit of Great Britain. The beverage is fast becoming in vogue among all classes, even among the poorest in Anatolia.

Tobacco. Increase by 3,575 cwts. (21,465*l.*) in cut tobacco and cigarettes shows that the régie is fairly prosperous, now that Erzeroum has been placed under the Trebizond Agency.

Woollen goods. Increase in woollen stuffs by 1,065 cwts. (20,135*l.*) is mostly in favour of Austria and Germany. The cloths of Belgium are augmenting and those of France diminishing. Blue serge for the IV Army Corps at Erzinghian continues to be imported from England.

Yarns. Decrease in yarns by 780 cwts. (5,455*l.*) is due to interrupted communications with industrial centres. Constantinople and Smyrna have of late attempted to supply demand, but failed owing to the quality being coarser than that of Great Britain.

Transit imports. The diminution of transit imports for Persia stands at 8,185 cwts. (37,970*l.*) compared with 1892, and much greater compared with the average of preceding years. The fall-off is mainly in sugar and tea, the one affecting France, and the other England. Sanitary and monetary causes, combining with scarcity of fodder in the interior, produced in the main the decrease observable.

Transit packages. Inquiries are often made as to what arrangements exist at Trebizond for goods in transit to Persia. The local expenses for each of such packages, when of usual bulk and not over 2 cwts., are as follows:—landing, leading, and porterage, 4½ pias. (9*d.*); waxcloth, canvas, ropes, &c., 15 pias. (2*s.* 6*d.*); commission to agents, including expenses at Erzeroum and Kizildizeh, from 7 pias. (1*s.* 2*d.*) to 12 pias. (2*s.*). An extra charge of 5 pias.

(10*d.*) is payable for opening and fastening at custom-house any tin-lined case. Small parcels are collectively packed for transport so as to weigh 100 kilos. (2 cwts.), double of which makes a camel's load, forwarded to Tabreez at a cost of from 150 to 200 krans (3*l.* to 4*l.*), half of which is paid on the safe arrival of the merchandise. Bulky goods are sent on vehicles in summer only, and at contracted rates of fare. Interdicted articles are not allowed to pass through for Persia; all weapons and cartridges, and also chemicals used in explosives, belong to this category. Drugs and medicines are examined by the municipal doctor who receives a fee of 20 pias. (3*s.* 4*d.*). Books, maps, and pictures undergo censorship involving long detention, if not confiscation, and an extra charge of 20 pias. (3*s.* 4*d.*) per parcel. Any printed or written matter whatsoever containing the word Armenia or Armenians, if detected, is certain of condemnation.

Shipping and Navigation.

Quarantines. Quarantine restrictions once more affected considerably the shipping interests at these ports. If compared with those of 1891 the figures in the Trebizond return would show for steamers alone the very marked decrease of 156 in number and 150,879 in tonnage. Nothing need be added to show how detrimental to shipping is the imposition of such sanitary measures. All intercourse with vessels along the litoral is strictly forbidden after sunset and before sunrise.

Lighthouses. The lighthouses on this coast are either disadvantageously situated or insufficient in number. The one on Halys Point is invisible to vessels westward bound from Samsoon, and hence it should be removed to the headland some 15′ east of the 36th degree, or another made on Injir-Burun. Should the construction be similar to those at some of the other stations—that is, lanterns hoisted up masts, the entire cost of erecting and maintaining these two additional beacons will not be considerable.

Charts. Navigators are to be warned that the existing charts of the Black Sea are defective as regards the Port of Fatza. From off the western point there lies submerged an ancient breakwater of some length, unmarked in maps, on which last summer an English and a Greco-Ottoman steamer founded, to be towed off only at some expense if not a little damage. It would be well to have the far end of the obstruction marked by a buoy.

Agriculture.

Drought The spring and summer months of 1893 were of exceptional dryness. A few showers fell in August, which did little more than save such cultivators as took prompt advantage of the slight change in the weather.

Indian corn, the staple article of food among the villagers, had scarcely attained the half of an ordinary year, so much so that supplies for local consumption had to be imported from abroad. Hazel-nuts were stunted by drought, while the heavy rains of September proved destructive to haricot beans and injurious to tobacco, followed as they were by drizzling days, which impeded these crops from being properly dried. Crops.

Notwithstanding agricultural distress the tithes of the vilayet were sold to the highest bidders at 15,787,730 pias. (138,500*l.*), which is above that of the preceding year by 1,138,000 pias. (10,000*l.*). Those of Kerassond and Ordoo were farmed out at lower prices, while the purchasers of the tithes in other parts had reason to declare themselves losers consequent on the tillers of the soil having this time successfully resisted their often undue exactions. Tithes.

Population and Industries.

The preceding epidemic of cholera at Trebizond begun October 30, 1892, and ended January 9, 1893. The last outbreak which declared itself November 14 and exhausted itself in 52 days was comparatively more virulent, having attacked 486 persons, of which 264 were males, killing 327, of which 161 were females. The official records, moreover, if at all reliable, serve to show the figures of the death-rate as 9·3 per 1,000 inhabitants, or 14·0 among Turks, 16·9 among Greeks, and 9·8 among Armenians. Cholera.

Besides other cantons, those of Kelkit and Sheyran in the Gumush-Khaneh district of the Trebizond province were stricken by famine in 1893. No less than 20,000 souls fled to the coast in search of weeds and offals. This was in the month of October. Such as were spared by disease and hunger were quartered on the inhabitants of the neighbouring villages, who are, doubtless, deserving of praise for the hospitality they are still so generously extending to these hapless fugitives. Famine.

Handicrafts were if anything more on the decline. Native cloths cannot cope with those of Europe, and the abandonment of national costumes is materially affecting local fabrics. What is wanted in all branches of native industries almost as much as capital is technical instruction and guidance, in order that the medieval methods still in use may reach nearer the requirements of the age. Factories.

Successful attempts at sericulture were made at Trebizond, which promises to attain some importance. The silkworm eggs were brought from Broussa, certified as untainted by the Public Debt Office on Dr. Pasteur's system. Mulberry plantations are to be laid out, which the humidity of the climate will, no doubt, benefit, without affecting, it is to be hoped, the well-being of the worm. Silk raising.

Public Works.

Roads. Greater activity was displayed during the year in road-making and road-mending. The expenditure incurred by Government alone amounted to 19,650*l.* for the whole vilayet, that is, besides bridges, 43½ miles of repairs and 17 miles of new sections or rather deviations. The figures stand as follows:—Trebizond-Erzeroum route, 3 miles built and 27 miles repaired; Trebizond-Platana, 4 miles repaired; Samsoon-Sivas-Baghdad, 12½ miles repaired; Samsoon-Bafra, 7½ miles built, and Samsoon-Charshamba, 6½ miles built.

Bridges. The bridges repaired by Government number 62, while those newly constructed number 41, viz.:—Trebizond-Platana, 2 repaired, 2 made; Trebizond-Erzeroum road, 18 repaired, 10 made; Samsoon-Bafra, 25 made; Samsoon-Charshamba, 4 made and 16 repaired. Besides the above, the Seradereh bridge was constructed by the inhabitants of Platana at a cost of 280*l.*, while the solid stone bridge over the Deïrmendereh River outside Trebizond was completed at an expense of 3,200*l.*, instead of 1,500*l.* as anticipated, which speaks so much the more to the honour and credit of the Lemlioglon Brothers.

General Remarks.

Poverty. Imports are invariably in excess of exports and the country is yearly becoming more and more impoverished. Some means should be found before long to balance the outgoing with the incoming commodities. It is the vital interests of the State to render assistance and encouragement towards the attainment of such a result. The fact that out of the public funds some 200,000*l.* were spent during the last 2 years in the relief of the inland famine-stricken districts is an argument to the point which will be understood.

Bankruptcies. The depressed condition of trade has of late years been keenly felt. Slack business and small profits caused several failures, and this not only among retail but wholesale dealers. British firms had therefore better restrict themselves to cash terms only in their business transactions with these parts. The Imperial Ottoman Bank, in this connection, affords the facility of cashing the amounts of such invoices as with their Bills of Lading are sent for the purpose to its care. The commission charged is, besides postage, &c., ¼ per cent. for collection at Trebizond and Samsoon, ¾ per cent. at smaller ports, and 1 per cent. at inland towns; the minimum being 5 pias. or 11*d.* where the bank has a branch office and 10 pias. or 1*s.* 10*d.* where it has only a correspondent.

Resources. The province has doubtless many undeveloped resources. Apart from the working of its mineral wealth there are other scopes for small capitalists, such as cattle breeding in meadows and pastures, poultry rearing in hilly localities, oyster culture in marine deposits, &c.

Even the collection of spontaneous productions, such as dyeing and medicinal plants and herbs, would prove remunerative to those with limited means, if made by them articles of commerce. The inhabitants are too dependent on the bounty of nature. Little or nothing is done towards preserving, improving, and increasing the fruits of the earth, the fertility of which is such that Rizeh oranges, edible though small, are selling here at 1*d.* per 20. The soil is favourable to vegetable growths of almost all kinds. Even a sort of tea is found wild in the mountains as well as cotton, the cultivation of both of which in the Caucasus is occupying now the attention of the Russian Government as it should do that of Turkey.

Railways wanted.

Hindrances and difficulties incessantly obstruct the conveyance of goods by packs and vehicles. The least time occupied by caravans from Trebizond to Erzeroum is 10 days, or 35 days for Tabreez. Railways are sadly needed in the country. Military objections to them must sooner or later be surmounted by arguments strongly in favour of rapid communication. It is indeed to be regretted that strategic reasons should ever be allowed to bar the way to such enterprises, which by enriching the State, strengthen its internal and external relations socially, politically, and internationally. It is needless to say that had Samsoon a railway to tap the grain-yielding districts of the Sivas, Kharput, and Diarbekir Vilayets, it would soon become a second Odessa. As for Trebizond, the usually superabundance of crops, so often allowed to rot in the great plateaux of Erzeroum and Alashgherd, both watered by the Euphrates, the live stock of Kurdistan and the important transit trade with the rich north-western provinces of Persia, indicate forcibly how very beneficial a railway from this coast would be to commerce and civilisation, Government and people. The route most recommendable as presenting the least engineering difficulties for such a railway, would be the one from Surmeneh up the Karadereh Valley to Baïrburt, and thence to Erzeroum, with a branch line along the coast to Trebizond or rather to Platana. The distance to be thus covered would not exceed 154 miles, that is, 30 miles from Platana to Surmeneh on ground little above sea level, 50 miles from Surmeneh to Baïrburt over a gradual ascent to 6,500 feet, and 74 miles from Baïrburt to Erzeroum down and across the extensive plain of 6,000 feet above sea level. Platana has a better harbour than Trebizond, while that of Surmeneh is well sheltered with deep anchorage close to the shore. The general yearly traffic on the Trebizond-Erzeroum road may be estimated to be some 40,000 travellers, 500,000 cwts. of goods, and 80,000 head of cattle.

RETURN of Principal Articles of Export from Trebizond during the Years 1893–92.

Articles	1893.		1892	
	Quantity	Value	Quantity	Value
ANATOLIAN TRADE.	Cwts.	£	Cwts.	£
Beans	33,700	12,130	46,340	18,535
Cattle (69,260 head)	69,260	69,260	32,520	32,520
Fruits and vegetables ..	20,180	7,750	13,100	4,850
Gall-nuts and gums ..	910	3,600	445	1,775
Glue	4,140	3,240	3,265	2,565
Guts	255	1,015	200	800
Hazel-nuts	93,635	71,140	91,240	66,175
Hides, skins, furs, &c...	6,850	24,065	3,335	12,010
Indian corn, bran, &c...	310	65	8,350	1,670
Linseed	32,020	11,530	33,460	12,045
Linen and hemp ..	1,660	13,180	870	6,960
Manganese	1,035	165	2,460	395
Mohair	350	1,050	200	600
Provisions	19,465	33,325	13,020	25,600
Porpoise oil	6,350	3,810	5,155	3,090
Tobacco	45,145	83,350	30,045	65,415
Walnutwood and box-wood	3,000	9,535	4,650	15,520
Wax	260	1,300	230	1,150
Wheat and flour ..	80	30	2,450	980
Wool	980	1,610	210	285
Other articles	13,645	22,640	9,250	14,465
Total Anatolian ..	353,230	374,460	300,745	287,925
PERSIAN TRANSIT TRADE.				
Carpets	7,130	76,130	5,120	61,465
Cocoons, &c.	230	4,320	25	800
Fruits (dried)	1,370	2,200	12,880	8,540
Gall-nuts and gums ..	100	500	80	400
Silk stuffs, shawls ..	1,760	141,120	1,455	116,480
Skins (goats)	150	450	200	600
Tumbeki	2,775	13,880	9,500	38,000
Wool and cotton ..	1,200	2,800	400	1,000
Other articles	560	2,315	720	5,045
Total Persian ..	15,275	243,805	30,330	232,420
„ Anatolian ..	353,230	374,460	300,745	287,925
Grand total	368,505	618,265	331,975	519,445

RETURN of the Principal Articles of Import to Trebizond during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Cwts.	£	Cwts.	£
ANATOLIAN TRADE.				
Barley	10,600	2,120	15,000	3,500
Beans	1,600	640	2,000	800
Candles	1,125	2,475	810	1,940
Chemicals and drugs ..	1,055	3,345	935	3,645
Coffee	3,820	17,570	5,635	22,545
Colours, dyes, paints, &c.	2,335	3,595	3,635	3,900
Copper	4,350	13,055	3,230	9,685
Cotton	615	1,230	780	1,565
„ goods	36,315	190,915	34,600	181,605
Crockery and glassware	6,290	4,220	6,680	4,180
Flour	148,220	59,290	74,265	32,275
Fruit, dried	2,300	1,380	3,260	2,470
Fruit and vegetables ..	10,360	2,130	8,245	2,000
Gunpowder	400	1,200	300	900
Haberdashery and fancy goods	920	9,370	1,190	10,200
Hardware, cutlery, and nails	16,680	17,235	14,595	21,400
Hazel-nuts	4,400	2,640	4,000	2,400
Hides, skins	9,960	19,915	6,975	13,950
Indian corn, wheat, &c.	139,820	28,140	52,100	10,390
Iron	28,520	10,150	23,590	5,660
Jewellery and gold thread	60	3,465	75	4,640
Leather, shoes, &c. ..	3,405	15,245	1,440	9,955
Limestone, cement, and tiles	20,000	3,400	14,365	2,475
Maccaroni, biscuits, &c.	1,090	1,385	980	1,205
Matches and vestas ..	3,070	2,760	2,765	2,475
Metals (lead, zinc, steel, &c.)	2,395	1,965	2,545	2,190
Native manufactures ..	1,910	11,470	3,015	21,110
Olives	6,020	4,815	9,330	5,700
Olive oil	8,090	12,130	8,335	12,505
Petroleum	20,000	6,000	16,000	4,800
Porpoise oil	4,100	2,460	2,000	1,200
Preserves (fish, caviare)	1,675	5,490	1,030	5,900
Rice	11,910	7,150	8,675	5,205
Sacks, bagging, and wax cloths	6,965	7,030	3,680	4,085
Salt	60,000	7,200	50,000	6,000
Silks and velvet stuffs ..	180	8,620	175	7,780
Silk, raw and waste ..	45	1,720	25	1,060
Soap	5,170	6,200	5,370	5,370
Spices	380	1,140	445	1,785
Spirits, wine, beer ..	11,675	12,910	10,140	11,250
Stationery, books, &c...	4,280	6,780	5,265	8,690
Sugar	45,925	43,485	45,695	45,695
Tea	5,610	28,040	3,565	21,395
Tin, bars and plates ..	1,600	5,000	1,225	3,430
Timber and firewood ..	20,400	2,440	18,470	2,855
Tobacco, cut	4,945	29,730	1,370	8,265

RETURN of the Principal Articles of Import to Trebizond during the Years 1893–92—continued.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Cwts.	£	Cwts.	£
ANATOLIAN TRADE—continued.				
Woollen goods	5,140	132,000	4,075	111,865
Yarns	2,385	10,730	3,165	16,185
Other articles	32,025	46,625	35,270	69,040
Total Anatolian ..	720,135	818,000	520,315	739,990
PERSIAN TRANSIT TRADE.				
Cotton goods	40,240	242,500	38,340	246,160
Crockery and glassware	4,640	6,170	3,900	6,260
Haberdashery and fancy goods	1,320	20,120	1,210	17,960
Hardware, cutlery, &c.	4,320	7,815	5,020	12,420
Leather, shoes, &c. ..	1,110	7,440	830	6,800
Matches, vestas ..	8,440	7,170	4,240	3,600
Metals (copper, &c.) ..	3,640	7,750	4,065	9,180
Silk and velvet stuffs ..	260	12,680	190	9,600
Stationery and books ..	1,110	2,825	1,610	4,300
Sugar	21,200	21,200	29,200	29,200
Tea	10,910	60,060	14,000	84,000
Woollen goods	4,160	89,800	3,840	85,800
Yarns	370	2,020	400	2,220
Other articles	3,450	9,300	5,610	16,730
Total Persian ..	104,270	496,650	112,455	534,620
„ Anatolian ..	720,135	818,000	520,315	739,990
Grand total ..	824,405	1,314,650	632,770	1,273,710

TABLE showing the Value of all Articles Exported from and Imported to Trebizond from and to Foreign Countries during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
ANATOLIAN TRADE.				
United Kingdom ..	20,905	28,270	247,560	246,320
Turkey and Egypt ..	236,300	165,230	225,175	191,930
Austria and Germany..	29,220	24,410	175,410	146,340
France	43,450	38,700	89,770	96,270
Russia	18,160	6,105	21,685	22,720
Roumania and Bulgaria	15,720	6,830	13,610	9,450
Holland	4,660	4,850	..	..
Greece	2,000	6,025	3,155	3,250
Belgium and Sweden ..	3,000	5,265	36,520	17,980
Italy	800	900	2,900	2,620
Switzerland	..	..	1,195	1,300
Other countries ..	245	446	1,020	910
Total Anatolian ..	374,460	287,025	818,000	739,090
PERSIAN TRANSIT TRADE.				
United Kingdom ..	21,940	22,550	321,460	353,690
Turkey and Egypt ..	192,480	193,455	4,045	4,425
Austria and Germany..	3,870	2,620	96,410	91,360
France	5,865	2,905	54,395	59,450
Switzerland ..	..	..	1,200	1,750
Greece	10,800	5,160	2,335	2,260
Roumania and Bulgaria	3,520	2,115	120	100
Belgium, Holland, and Sweden	2,730	2,555	13,195	19,060
Italy	1,000	805	3,025	2,205
Other countries ..	1,600	255	465	320
Total Persian ..	243,805	232,420	496,650	534,620
Grand total ..	618,265	519,445	1,314,650	1,273,710

RETURN of the Principal Articles of Export from Samsoon during the Years 1893-92.

Articles.	1893.		1892	
	Quantity.	Value.	Quantity.	Value.
	Cwts.	£	Cwts.	£
Flour	232,810	70,140	139,000	56,000
Fruits and vegetables..	16,000	8,000	24,210	11,385
Goat skins	4,040	3,400	4,780	9,520
Native manufactures ..	1,000	10,000	2,000	12,000
Oats	77,730	15,540	184,825	27,000
Opium and poppy seed	810	70,000	27,510	105,780
Silk and cocoons ..	200	4,000	530	11,500
Tobacco	125,730	288,000	129,585	295,525
Wheat and maize ..	182,120	50,660	620,720	168,100
Wool and tiftic ..	8,900	34,520	13,270	54,660
Yellow berries and gums	4,880	7,950	9,550	17,120
Other articles	67,010	49,940	32,925	27,530
Total	722,230	612,090	1,188,905	796,120

RETURN of the Principal Articles of Import at Samsoon during the Years 1893-92.

Articles.	1893.		1892	
	Quantity.	Value.	Quantity.	Value.
	Cwts.	£	Cwts.	£
Coffee	4,855	20,000	4,990	15,610
Copper	4,000	12,000	4,145	15,540
Cotton stuffs	28,930	268,000	40,610	356,110
Crockery and glassware	8,400	3,880	6,475	3,235
Haberdashery and fancy goods..	120	1,050	300	2,000
Hardware, nails, &c. ..	15,115	29,000	13,780	27,730
Iron	46,800	18,000	47,920	19,750
Leather and shoes ..	2,385	5,700	1,185	4,560
Matches and vestas ..	2,405	5,330	2,340	4,205
Metals	2,500	6,000	2,545	6,200
Petroleum	23,500	8,700	22,900	8,800
Provisions	6,500	5,900	5,940	8,230
Spirits, wine, beer, &c.				
Stationery	8,040	10,900	7,525	11,765
Sugar	5,080	16,470	4,105	11,810
Woollen goods and apparel	32,650	32,000	28,635	28,740
Yarns	950	16,400	750	12,000
Other articles	15,400	43,000	8,520	28,540
	88,595	40,225	203,445	66,685
Total	295,625	580,625	405,900	630,400

TABLE showing the Total Value of all Articles Exported from and Imported to Samsoon from and to Foreign Countries during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
United Kingdom ..	35,525	118,315	292,205	302,445
Turkey	347,600	365,080	114,230	192,840
Austria-Hungary ..	35,000	12,800	67,470	72,850
France	85,700	139,240	27,900	25,075
Russia	7,140	8,880	10,215	8,900
Germany	17,320	37,630	505	2,000
Egypt	72,250	90,050	620	1,000
Greece	..	5,260	120	1,640
Holland	4,800	11,520	..	..
Italy	6,755	6,700	1,750	1,210
Belgium, &c.	..	645	15,510	22,440
Total	612,090	796,120	530,525	630,400

RETURN of all Shipping at the Port of Trebizond during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	12	11,905	12	11,905
Ottoman	8,456	42,663	123	120,513	8,579	163,176
French	...	...	76	98,792	76	98,792
Austro-Hungarian	...	...	68	71,447	68	71,447
Russian	24	1,435	38	40,837	62	42,272
Greek	6	2,218	31	44,767	37	46,985
Danish	...	...	11	12,814	11	12,814
German, &c. ...	...	...	1	976	1	976
Total	8,486	46,316	360	402,051	8,846	448,367
,, for the year preceding ...	7,049	29,389	345	364,464	7,394	373,853

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	12	11,905	12	11,905
Ottoman	8,456	42,663	123	120,513	8,579	163,176
French	...	...	76	98,792	76	98,792
Austro-Hungarian	...	...	68	71,447	68	71,447
Russian	24	1,435	38	40,837	62	42,272
Greek	6	2,218	31	44,767	37	46,985
Danish	...	...	11	12,814	11	12,814
German, &c. ...	...	...	1	976	1	976
Total	8,486	46,316	360	402,051	8,846	448,367
,, for the year preceding ...	7,049	29,389	345	364,464	7,394	373,853

RETURN of all Shipping at the Port of Samsoon during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	5	5,334	5	5,334
Ottoman	2,135	10,185	172	168,180	2,307	178,365
French	...	...	78	104,460	78	104,460
Austro-Hungarian	...	...	73	85,220	73	85,220
Russian	...	...	65	57,523	65	57,523
Greek	...	...	48	56,820	48	56,820
Danish	...	...	11	14,660	11	14,660
German ...	...	...	8	7,518	8	7,518
Total	2,135	10,185	460	488,685	2,595	498,870
,, for the year preceding ...	2,456	12,493	505	500,564	2,961	513,057

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	5	5,334	5	5,334
Ottoman	2,135	10,185	172	168,180	2,307	178,365
French	...	...	78	104,460	78	104,460
Austro-Hungarian	...	...	73	85,220	73	85,220
Russian	...	...	65	57,523	65	57,523
Greek	...	...	48	56,820	48	56,820
Danish	...	...	11	14,660	11	14,660
German	...	...	8	7,518	8	7,518
Total	2,135	10,185	460	488,685	2,595	498,870
,, for the year preceding ...	2,456	12,493	505	500,564	2,961	513,057

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1894.

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No 1350.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE AND FINANCE.

TURKEY.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF THE CONSULAR DISTRICT OF JERUSALEM.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1186.

Presented to both Houses of Parliament by Command of Her Majesty, APRIL, 1894.

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1287.	Pekin	1d.	1347.	Algiers	3d.
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TURKEY.

JERUSALEM.

Consul Dickson to the Earl of Kimberley.

My Lord, *Jerusalem, March* 19, 1894.

I HAVE the honour to transmit herewith a Report on the Trade and Commerce of this Consular District, together with a copy of a Report on the Trade of the Port of Jaffa by Mr. Consular-Agent Amzalak.

I have, &c.
(Signed) JOHN DICKSON.

Report on the Trade and Commerce of the Consular District of Jerusalem for the Year 1893.

ABSTRACT of Contents.

	PAGE
Exports and imports	1
British trade	3
Shipping	3
Enterprises	4
Public works	4
Jaffa trade report	5

Imports and Exports.

In 1893 there was, on the whole, an improvement in the trade and commerce of this consular district as compared with 1892. Improvement in trade in 1893.

The total value of the exports and imports reached 682,168*l.* as against 601,063*l.* during the previous year, showing an augmentation of 81,105*l.* Total value of exports and imports.

The amount and value of the exports were greater than in the year 1892, the total value of the articles exported being 332,628*l.* compared with 258,466*l.* in 1892, or an increase of 74,162*l.* Exports.

Olive oil. There was a noticeable increase in the exportation of olive oil, mainly owing to the crop of olives in 1893 having been abundant.

Soap. Soap was also exported to a very considerable amount, 112,000*l.* worth having been sent out of the country in 1893 as against 46,800*l.* in 1892.

Oranges. Oranges were likewise shipped in greater quantities than during the previous year, the increase in the exportation being 7,500*l.* more than in 1892. The trade in oranges may be said to have been fairly good, the total value exported in 1893 being estimated at 69,500*l.*, whereas in 1892 it was calculated at 62,000*l.*

Number of boxes shipped in 1893. About 278,000 boxes are stated to have been shipped in 1893 compared with 248,000 boxes during the previous year.

Injury to the trees by storms. The orange groves were much injured by the unusual cold and storms which occurred during the winter of 1892–93, but the crop was abundant notwithstanding. The effect, however, of the injury sustained by the trees has been perceptible this year, for the crop of 1893–94 has been about one-third less than the one of the previous season, though the fruit is reported to be in good condition.

Fruit in good condition notwithstanding.

Freights per box to England. Freights averaged about 1*s.* 3*d.* per box to England during the season of 1893, and the average number of boxes shipped each voyage from Jaffa was from 9,000 boxes to 10,000 boxes.

Keeping properties of Jaffa oranges. The keeping properties of the Jaffa oranges give them an advantage over those of other countries as regards exportation, and their delicate flavour, as well as the great size of some of the different kinds grown, will always secure a good market for them in the United Kingdom and elsewhere.

Attention drawn to Jaffa oranges in Australia and the Cape. Attention has been drawn to the superior qualities of the fruit, both at the Cape and in Australia, and these colonies may find it advantageous to promote the planting and cultivation of young trees procured from Jaffa.

Colocynth. Colocynth, although in demand in the European markets, was not exported in such considerable quantities in 1893 as during the previous year. It is gathered by the Arabs, in the vicinity of Gaza, where it grows wild, but in consequence of the levying of the tithe by the authorities, which has of late been exacted from the exporters, instead of from the Bedouins who collect the article, shipments were somewhat less in 1893 than in 1892.

Diminished exportation on account o levying of tithes on colocynth.

Sundries. As regards sundries there has been a falling-off in the exportation as compared with the previous year.

Olive wood-work. One of the principal articles under this heading is olive wood-work, which now forms an important industry in Jerusalem, and which now finds a market in the United States as well as in Europe.

Work in mother-of-pearl. Articles of furniture inlaid with mother-of-pearl are likewise exported to some extent.

Imports. As regards the imports there has also been an increase compared with 1892, the total value of the articles imported

in 1893 being 349,540*l.* as against 342,597*l.* in 1892, or an increase of 6,943*l.*

Coffee, rice, sugar, hardware, wine and spirits, tiles, salt, flour, coal, and sundries were imported in greater quantities in 1893 than in 1892, whereas there was a diminution in cotton manufactures, cloth, timber, and iron. Increase in certain articles imported. Diminution in others.

Rice was imported to the value of 42,600*l.*, showing an increase on the year 1892 of 12,360*l.* Rice.

Coffee showed an increase of 5,945*l.*; sugar, 5,820*l.*; and sundries, 1,700*l.* Coffee. Sugar.

British Trade.

Trade with Great Britain was fairly good, the total value of the imports and exports amounting to 122,568*l.* compared with 121,766*l.* in 1892. There was a falling-off in 1893 in the exports to the United Kingdom as compared with the previous year, but British imports have been steadily increasing for several years past. In 1890 the value of British imports was 17,400*l.*; in 1891, 22,000*l.*; in 1892, 50,156*l.*; and last year, 52,600*l.* Trade with Great Britain. Total value of exports and imports. Exports to United Kingdom. Steady increase in imports.

Among the articles of import English ale had for some years ceased to find a market in this country, German and Austrian beer having taken its place. English ale.

German beer had got into favour, not only in this market, but in most of the seaports and towns in the East, on account of its greater cheapness, and of the impression that it is less alcoholised. Moreover, the German colonies in Palestine have been in the habit of manufacturing their own beer, which, though light as a beverage, is somewhat rough to the taste. German beer hitherto preferred.

English ales, however, such as are manufactured for consumption in India, are again beginning to find favour in this country, as they are equally well adapted to the climate as German and Austrian beer, and superior in quality. German and Austrian beer is for the most part, imported in 70 centilitre bottles at a cost of about 50 fr. per 100 bottles, and retailed at 87 c. per 1 bottle; litre bottles being sold at from 1 fr. 20 c. to 1 fr. 45 c. each. English ale is now sold retail at from 9*d.* to 1*s.* the quart bottle. English ale again finding a market. Prices of German and English beer.

Shipping.

There has been an increase in the number of vessels that entered and cleared in the port of Jaffa in 1893 as compared with 1892, and as regards British vessels the increase was about 44 per cent. more than during the previous year. Increase in number of vessels at Jaffa in 1893.

Several lines of British steamers are engaged in the trade with Palestine and Syria, and in 1893 an addition to their number was made in "Knott's Prince Line," which runs fortnightly from Manchester and Antwerp, and monthly from London and Hamburg, to Alexandria and the Syrian Coast and back, calling at Jaffa during these trips. These boats carry passengers as well as goods. English steam vessels engaged in trade. Addition of "Knott's Prince Line in 1893.

Enterprises.

Enterprises. Collection of bitumen from Dead Sea.

Under this heading it may be mentioned that in 1893 an attempt was made to "exploit" the bitumen which rises to the surface and floats about on the Dead Sea. Two sailing boats were brought up from Jaffa by train to Jerusalem, and then conveyed on carts to the Jordan where they were floated down the river to the Dead Sea, and they have since been employed for picking up the bitumen, which is in much request in Europe.

Desirability of a ferry across the Dead Sea.

It would be very desirable and would tend much to promote trade with the inland districts if a steam launch and several lighters were placed on the Dead Sea, as the produce of Moab, which is a country rich in cereals, fruit, and cattle, could then be ferried across in a few hours in the lighters in tow of the steam launch, instead of having to be conveyed by caravans round the north or south end of the Dead Sea, entailing a journey of from 4 to 5 days. Kerak, the chief town in Moab, is now garrisoned with Ottoman troops, and the Government authority has been established there; and if rapid and easy communication were encouraged with the west side of the Dead Sea and Jordan, almost the whole of the produce of Moab would find a market in Jerusalem, and could ultimately be transported by rail from Jerusalem to the coast.

Public Works.

With regard to public works, buildings of various kinds continue to be erected in the vicinity of Jerusalem, and the city is fast outgrowing its former limits. On the western side houses have increased so rapidly within the last few years, that quite a large suburb has arisen where formerly fields and vineyards existed. Every available piece of land is now being bought up by private persons or by benevolent societies and missions, and already the name of "Modern Jerusalem" has been given to this new quarter.

Erection of buildings on west of Jerusalem.

Public gardens completed in 1893.

During the past year the first public garden was completed outside the Jaffa gate, and although, as long as Jerusalem has no proper water supply, any improvement of this character must necessarily be on a small scale, yet the present public garden has done away with what formerly used to be a waste heap, and has provided the inhabitants with a place of recreation and resort during fine weather.

Concession for irrigating orange groves at Jaffa.

A concession for irrigating the plain and orange groves of Jaffa with water from the River Auja is reported to have been given by the Porte to a Mr. Navon of this city, who is now in Constantinople, and who had obtained the concession for the Jaffa-Jerusalem Railway.

Concession for constructing a harbour at Jaffa.

A concession, however, for the construction of a port at Jaffa, which, it was stated, had been applied for by a firm at Constantinople has not yet, it seems, been granted.

JAFFA.

Mr. Consular-Agent Amzalak reports as follows:—

Imports and exports.

As will be seen from the annexed tables, the principal articles of import and export have increased during the past year.

Orange crop.

Notwithstanding the heavy rains and wind of the winter of 1892–93, which caused great damage to the fruit trees in general, the orange crop was a very abundant one, and the amount of oranges exported shows an increase on the previous year. However, although shippers selected carefully their fruit for shipment, it reached its destination in a somewhat bad condition, which caused considerable loss to the exporters.

Sesame seed.

The crop of this article was very abundant last year, but shippers did not meet with good prices in the French markets, and the exportation was not great.

Cereals.

For some years past the crops of wheat, barley, and "dhurra" (Indian corn) have been bad in this consular district, and no important shipments were made of these articles from this port.

Gaza barley.

The crop of barley in the vicinity of Gaza was a very good one in 1893, and 15,000 tons were exported during the year, 10,000 tons of which went to Great Britain, and the rest to other countries.

Appointment of agents by manufacturers advisable.

As the population and commerce of this seaport are increasing annually, our home manufacturers would do well to follow the system adopted by those of Austria, France, and Germany by introducing their produce into the country through agents resident in the place, who by obtaining orders from the native dealers are able to promote the business of their principals.

Shipping.

Number of vessels that entered and cleared in 1893.

During the year 1893 there has been an increase in the number of vessels that entered and cleared at the port of Jaffa, both in number and tonnage, as compared with the previous year, 219 vessels having entered and 220 having cleared more than in 1892, and the increase in tonnage was 98,225 tons, and 99,120 tons respectively.

"Prince Line" of steamers.

The British steamers of the Prince Line also began to run last year, calling at Jaffa, and the other ports on the Syrian coast.

Public Works.

Concession for a harbour at Jaffa.

Several companies have applied to the Sublime Porte for a concession to build a harbour at Jaffa, and it is expected that such a concession will soon be granted. A good harbour would be of great use, and would do much to facilitate

the trade of this place, besides permitting passengers to land safely, as accidents are of yearly occurrence during bad weather.

Construction of a harbour a profitable enterprise.

The enterprise, if undertaken, will, no doubt, prove a profitable one, as the number of vessels touching at Jaffa is steadily increasing.

Jaffa-Jerusalem Railway.

There is a daily passenger train leaving Jaffa for Jerusalem, and another one from Jerusalem to Jaffa, and also two goods trains.

Transport of merchandise by camels.

Still a considerable amount of merchandise is conveyed by camels between the two places, on account of both the Jaffa and Jerusalem railway stations being situated at some distance from the town. The railway company, in order to give further facilities to merchants, employ camels for the transport of goods from the different warehouses to the stations.

Prolongation of line to Nablous and Gaza.

It is rumoured that the line will be prolonged to Nablous and Gaza.

Erection of new shops and stores.

A series of buildings, consisting of 100 shops and stores, are now being constructed by the Greek Convent just outside the old gate of the town, and a number of new houses will be erected on the top of them.

Concession for irrigating Jaffa gardens already given by Porte.

It is reported that the concession for irrigating the Jaffa gardens by water from the River Auja has already been given at Constantinople, but a company has not yet been formed to carry out the scheme.

Repair of carriage road from Jaffa to Jerusalem.

The local authorities received orders some time back from Constantinople to repair the carriage road to Jerusalem, which had been neglected for some years, and the necessary work is going on. When this road will be properly repaired many travellers, who prefer to drive to Jerusalem, in order to obtain a better view of the country, will then be easily able to make the journey.

RETURN of Principal Articles of Export from Jaffa during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Wheat	Quarters	..	..	..	..
Maize	„	3,246	2,580	695	420
Olive oil	Lbs. ..	1,159,200	13,848	11,000	1,358
Sesame	Tons ..	4,000	52,940	5,000	69,350
Soap	„ ..	3,900	112,000	1,800	46,800
Wool	Lbs. ..	239,200	2,400	380,000	5,550
Oranges	Boxes ..	278,000	69,500	248,000	62,000
Colocynth	Lbs. ..	42,000	950	88,700	2,580
Rags	Bales ..	70	140	320	640
Hides	Lbs. ..	248,000	4,070	372,000	7,100
Beans	Quarters	5,690	5,120	625	556
Lupins	„	15,695	11,040	2,500	1,387
Barley	„	..	..	..	..
Bones	Tons ..	269	560	410	1,025
Other articles ..	..	..	57,480	..	59,700
Total	..	..	332,628	..	258,466

RETURN of Principal Articles of Import to Jaffa during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Cotton goods ..	Bales ..	4,850	74,900	5,100	78,850
Coffee	Tons ..	202	21,500	192	15,552
Rice	„ ..	3,550	42,600	2,520	30,240
Sugar	„ ..	1,240	22,320	810	16,500
Petroleum	Boxes ..	50,000	10,000	56,500	11,300
Hardware	„ ..	975	5,100	810	4,350
Fancy goods ..	„ ..	2,725	21,800	2,650	21,200
Cloth, fine	Yards ..	24,000	11,800	25,500	12,250
„ secondary ..	„ ..	36,200	6,700	34,000	6,500
Wine and spirits ..	Lbs. ..	315,000	2,460	285,000	2,240
Coal	Tons ..	4,450	6,960	3,200	4,900
Timber	Pieces ..	1,245,000	60,200	1,650,000	77,500
Tiles	„ ..	495,000	3,100	490,000	2,940
Salt	Tons ..	525	3,850	395	2,900
Flour	Sacks ..	5,250	7,300	4,750	7,125
Iron	Tons ..	2,750	21,750	2,950	22,750
Other articles ..	..	..	27,200	..	25,500
Total	..	..	349,540	..	342,597

TABLE showing the Total Value of all Articles Exported from and Imported to Jaffa from and to Foreign Countries during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	69,968	71,610	52,600	50,156
Turkey	51,200	31,356	46,300	47,844
France	49,736	53,000	55,200	53,000
Italy	3,664	8,000	21,000	22,000
Egypt	125,240	52,000	58,000	56,000
Russia	2,160	9,000	29,500	28,000
America	1,540	1,000	2,800	3,000
Germany	6,000	5,600	15,000	14,000
Cyprus	120	100	2,460	2,240
Other countries ..	23,000	26,800	66,680	66,357
Total	332,628	258,466	349,540	342,597

RETURN of all Shipping at the Port of Jaffa during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	69	54,491	69	54,491
Turkish	498	18,567	42	43,614	540	62,181
Austrian	...	...	104	134,047	104	134,047
French	...	...	59	92,626	59	92,626
Egyptian	...	...	102	103,059	102	103,059
Russian	...	...	51	76,776	51	76,776
Other countries ...	15	5,240	12	9,162	27	14,402
Total	513	23,807	439	513,775	952	537,582
,, for the year preceding ...	...	...	...	...	733	439,357
Increase in 1893	...	...	...	...	219	98,225

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	69	54,491	69	54,491
Turkish	498	18,567	42	43,614	540	62,181
Austrian	...	...	104	134,047	104	134,047
French	...	...	59	92,626	59	92,626
Egyptian	...	...	102	103,059	102	103,059
Russian	...	...	51	76,776	51	76,776
Other countries ...	15	5,240	12	9,162	27	14,402
Total	513	23,807	439	513,775	952	537,582
,, for the year preceding ...	...	...	...	...	732	438,482
Increase in 1893	...	...	...	...	220	99,100

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1894.

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TURKEY.

REPORT FOR THE YEAR 1893

ON THE

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REFERENCE TO PREVIOUS REPORT, Annual Series No. 1099.

Presented to both Houses of Parliament by Command of Her Majesty, MAY, 1894.

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1359.	Cadiz	1½d.
1360.	Marseilles	1½d.
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TURKEY.

ANGORA.

Consul Cumberbatch to the Earl of Kimberley.

My Lord, *Angora, April* 20, 1894.

I HAVE the honour to send herewith my Commercial Report for the Year 1893.

I have, &c.
(Signed) H. A. CUMBERBATCH.

Report on the Trade and Commerce of Angora for the Year 1893.

ABSTRACT of Contents.

	PAGE
Preliminary remarks	2
Exports	2
Average prices	3
Imports	3
Revenue	3
Tobacco monopoly	3
Public debt administration	3
Railway traffic	3
Local industries	4
Modes of livelihood	5
Rate of wages	6
Clothing	6
Cost of living	7
Furniture	7
Additional expenses	7
Railway extension	7
,, rates	8
Roads	8
Water supply	8
Bank	8
Insurance offices	8
Suggestions for development of direct trade with the United Kingdom	8

Preliminary Remarks.

In view of the attention that has been attracted towards the Angora district since the extension, in December, 1892, of the railway from Constantinople, and considering the development of the natural resources of this region which is expected therefrom, it may be found useful if some general information were offered on matters connected with the local trade and commerce derived from former consular reports and recent publications, as well as from data collected since the establishment of Her Majesty's Consulate at Angora last autumn.

Exports.

Owing to the absence of any reliable sources from which anything like accurate statistics can be obtained, tables of exports and imports cannot be compiled, and a comparison between the trade of 1893 with that of preceding years is not feasible.

Tables have been included in former reports from this post, but the figures represented approximate estimates only. Taking the value given in one report for the exports of 1884 as 295,000*l.*, and comparing them with another that placed their value for 1887 at 521,500*l.*, a difference of 226,500*l.* is shown whilst there was no apparent reason to account for this rapid increase of nearly 50 per cent. in the space of 3 years. It may, however, be safely stated that the railway extension to Angora has been the means of increasing exports all round to an appreciable extent, especially in cereals, owing to the transport facilities which enable local produce to compete with that of other regions, which was not the case hitherto.

The chief articles of export and their principal destinations are as follows:—

Mohair ("tiftik"), exported chiefly from the Angora, Sivrihissar, Bey-Bazar, Nallyhan, and Keskine districts, for the United Kingdom.

Wheat and barley, from all over the province, to Constantinople, London, and Marseilles.

Opium, mainly provided by Angora, Bey-Bazar, Sivrihissar, and Nallyhan, for the London market.

Carpets and rugs, made at Kir-Sheir and district, for London, New York, and Marseilles.

Wool, from Haimana, to Marseilles.

Sheep, from the same district, to Constantinople.

Yellow berries, from Cesarea, Kaledjik, and Angora, shipped to Liverpool and Marseilles.

Gum tragacanth, from Yozgat, Iskilip, Cesarea, Kaledjik, and Angora, to Liverpool and Marseilles.

Silk cocoons, from Nallyhan, for the factories of Broussa and Lyons.

Pears and apples, from Angora district, to Constantinople.

Basturma (Pemmican), from Cesarea, to other parts of Turkey.

The Angora average market prices, in 1893, of articles of export are given in Annex A. Average prices.

Imports.

The chief articles of import are calicoes, prints, shawls, muslins, cutlery, arms, metals, crockery, glass, colonials, tobacco, petroleum, and ironware. Their total annual value is roughly estimated at a little over 500,000*l.*, and is slightly in excess of that of exports, but figures are unobtainable, and no proper classification according to countries of origin is possible, as the bulk of the merchandise is purchased from or through Constantinople importing firms.

With the exception of Manchester calicoes and prints and a certain amount of Sheffield cutlery, it is doubtful whether any of the other manufactures enumerated above are really British goods as asserted.

Revenue. According to official statistics the total value of the various sources of revenue of this province for the last financial year amounted to 406,835*l.*, the tithes producing 121,200*l.*, and as compared with the year 1891 (no figures having been published for 1892) the total shows an increase of 61,600*l.*, the tithes having augmented by 51,200*l.*, which is taken as a sign that there has been an increased cultivation, owing to a greater demand for exportation caused by the greater transport facilities.

Tobacco monopoly. The gross receipts of the Angora branch of the tobacco monopoly, from the sale of tobacco and cigarettes, by 928 retail dealers, amounted to 73,764*l.* during the financial year ended February 28, 1894, showing an increase of 1,171*l.* on the preceding year when there were 1,069 retail dealers.

Public Debt Administration. The revenues administered by the Ottoman Public Debt Administration are those derived from the sale of revenue stamps, the salt monopoly, the silk and spirit taxes, and the tobacco tithes. The gross receipts in the Angora district for the year 1892 were 55,655*l.*, and showed an increase of 6,560*l.* in 1892, the augmentation being principally in salt which is the most important item.

Railway traffic. Through the courtesy of the Anatolia Railway Company's manager, a table is enclosed (Annex B) showing the traffic done in goods and passengers between Angora and Constantinople during the first working year (1893). The results are not as satisfactory as they might have been had not quarantine regulations and other causes interfered to the detriment of local trade in general. Two-thirds of the out-going goods consisted of cereals and one-third of mohair, yellow berries, fruit, &c. The bulk of the imports consisted of manufactured articles and colonials. The animals transported were all sheep, and at the rate of 90 per wagon, numbered 8,550 head. The passengers carried were mostly of the 3rd class and averaged 18 per diem.

Local industries. Factories.

To the difficulties that have hitherto existed for transporting machinery, and to the want of enterprising spirit, is due the absence of factories employing steam-power. The only establishment that can be called by that name is a steam flour-mill set up at Angora 3 years ago and doing fairly well.

The Armenians and Greeks have proved good mechanics elsewhere, and those of Angora are not deficient in patience and aptitude for learning, and would soon adapt themselves to the working of machinery which has now the railway as means of transport.

Looms.

The local industry connected with the spinning and weaving of mohair, formerly most flourishing, has been reduced to a very low ebb and is nearly extinct owing to the cheapness of European articles of clothing. The looms are few in number, and the commodity prepared for exportation is reduced to a fraction of its former quantity.

Carpets, &c.

The manufacture of carpets, rugs, and hangings still goes on at Kirsheir, and an attempt to start this industry at Angora by bringing a specialist and his family from Sivas and by returning to the old patterns which, at Kirsheir, had been altered of recent years for floral designs that had not found favour and had affected the demand.

The other places where carpets and rugs of an inferior sort are made on a smaller scale are Sivrihissar, Yapan Haman, Bala, Caya-Serai, Medjour, Sungurlou, Ak-dagh Maden, Boghazlian, Indjé-Sou, and Develiu.

Saddle bags.

Strong saddle-bags of carpet stuff (Heibés) are made in the Kirsheir, Mihalidjik, and Bala districts, while mohair and woollen saddle-cloths are made at Sivrihissar.

Waist-bands. Prints, &c.

Broad woollen and cotton waistbands which are sent to all parts of Turkey are produced at Cesarea and Bey-Bazar. At the former place are also found coloured and embroidered stuffs, prints (bazma), and muslins (yéméni).

Aba.

A thick woollen material called "aba" is manufactured at Boghazlian, Ak-dagh Maden, and Tchoroum.

Shawls.

The latter place and Develiu produce woollen shawls (shals) and cotton shirts.

Aladja. Towels.

Striped prints (called aladja) are made at Tomarza and Kaledjik, at which place, as well as at Cesarea and Bey-Bazar, towels are made.

Bez. Shayak.

A common cotton material called (bez) is manufactured at Ayash and Indjé-Sou and a fine flannel (shayak) at Tomarza.

Goats' hair, sacks, &c.

A strong durable material, generally of a dark brown colour, is made at Cesarea of goat's hair. Sacks (pala) and tents of goat's hair at Haimana.

Socks, &c.

Thick woollen socks and gloves at Sivrihissar, Haimana, Ayash, Ak-dagh Maden, and Indjé-Sou.

Saddlery.

Saddlery and travelling gear at Kir-sheir and Medjour.

Furniture.

Chairs, tables, and other articles of household furniture at Cesarea and Kir-sheir, of walnut wood.

Clay pipes, &c.

At Boyalik pipes and small jugs are made out of a yellowish clay which colours like meerschaum.

Wine and "raki" of a very good quality are made at Angora. The latter also at Cesarea, which place is specially renowned for the preparation of "basturma" (pemmican), a sun-dried meat strongly favoured with garlic, and an important article of diet all over the district. Wine. Basturma.

Bey-Bazar produces quantities of a walnut sausage called "Djevizli soudjouk." Strings of walnuts are dipped into grape juice, boiled with a mixture of flour until the juice sticks, about an inch thick, to the nuts. This is then dried in the sun till hardened. This sweet-meat is sent all over the country. Walnut sausages.

At Nally-han a considerable amount of silkworm rearing is done and the produce is sent to the Broussa and Lyons factories. Silk-cocoons.

Linseed oil is made at Cesarea, and in a suburb of that town there is a small gunpowder factory. Linseed oil. Gunpowder.

A few tanneries exist in the towns, especially at Angora and Cesarea, where dyeing, with vegetable dyes is still carried on, wool for carpets and striped cotton materials being the principal articles worked. Tanneries.

According to long established usage the Moslem rural population monopolises the purely agricultural pursuits, whilst the Christians are the produce exporters, proprietors, money-changers, agents, and shopkeepers. A Turkish merchant doing business on his own account is rare, and a Christian peasant tilling the soil with his own hands is seldom seen. Modes of livelihood.

The business relations between the members of the different creeds have hitherto been on an excellent footing, but events have occurred during the last 2 or 3 years which have affected these friendly dispositions, to the detriment of trade in general.

The ranks of the various branches of the administration are filled by the dominating race. Angora being the chief town of the province and the seat of the Governor-General, this class is there abundantly represented by past, present, and expectant holders of office. The Mussulmans are the principal landowners and stock farmers, horse and cattle dealers, some are grain and flour merchants, numbers are retail shopkeepers dealing in the produce of the district; they are bakers, butchers, grocers, sellers of fruit, vegetables dairy produce, spices, cordage and charcoal.

The handicrafts engaged in by both Christians and Moslems are those of shoemaker, blacksmith, iron and copper worker, muleteer, and water-carrier.

The Armenian and Greek communities, besides the usual professional classes, viz., clergy, lawyers, and doctors, include the more important merchants engaged in buying, selling, and exporting the special products of the district, in the manipulation of which considerable numbers of mohair and wool sorters, middlemen and assistants are employed.

The import trade, both wholesale and retail, is almost entirely in the hands of Christians.

Between the mercantile and industrial classes come the money changers, money lenders, tithe collectors, tax gatherers and

auctioneers, chiefly Christians, who also follow the ordinary trades and furnish stonemasons and marble cutters (chiefly Greek Lazes), builders, labourers, carpenters, painters, glaziers, cabinet-makers, weavers, dyers, and cooks, all producing inferior workmanship.

The few trades offering occupation to both creeds are tailors, shoemakers, silversmiths, and jewellers, each producing articles to suit the fashions of their different clients, the Turks providing the commonest class of goods.

The extensive industry in harness-making is almost exclusively Turkish.

A small number of Europeans engaged as merchants, agents, doctors and apothecaries are resident at Angora, but among them are no British subjects.

During the latter part of the 17th and throughout the 18th centuries a colony of British, French, and Dutch merchants inhabited Angora and carried on a flourishing trade in mohair, which was prepared in their warehouses and exported to Europe, now two or three British firms only are represented by native agents.

RATES of Wages.

Description.	Amount.		Remarks.
	From—	To—	
	s. d.	*s. d.*	
Unskilled labour	0 9	1 8	Per diem.
Skilled labour	2 0	5 0	„
Mohair sorters	1 3	2 0	Regulated according to the demand.
Women sorters.. ..	..	0 5	Per day.

Clothing.

The Turkish peasantry have clothing of a very simple and inexpensive kind. Summer and winter they wear grey or unbleached cotton underclothing. Their upper garments are composed of gaudy printed cottons, manufactured in Manchester expressly for the Turkish market. In winter a cotton quilted upper garment is added by both sexes. The women wear a thick muslin veil which covers face and figure, leaving the eyes only exposed. No hats are worn.

For weddings and holidays both sexes wear an upper raiment of coarse native-spun silk, made at Broussa and Aleppo.

In the towns the wealthier classes add to their costume, generally made up in European style and of European material, a fur-lined pelisse made very ample.

The fez, or red cap, is worn by the entire male population, the Moslems generally adding a turban.

The boot worn by the Turks is of soft leather, with an outer shoe of coarser material. The Christians have adopted the European boot, with an over-shoe fastening with a spring, so as to be easily removed when indoors.

The peasant's clothing costs from 1*l.* to 1*l.* 10*s.*, and, the material being coarse and flimsy, requires renewal every six months. The winter quilted garment costs from 8*s.* to 10*s.* extra. The "képének" is still worn by shepherds and peasants in the neighbourhood of Angora, Sivrihissar, and Haimana. It simply consists of one big piece of thick felt with a hole for the head to pass, and open down the front.

Cost of living.

The cost of living is comparatively low in the town of Angora, which can, however, be taken as a high estimate of what it is in other towns of the interior. This is accounted for by the fact that nearly every native family has its own town and country house; the latter has invariably some acres of vineyard, with fruit trees and melon grounds, the produce of which is collected and helps to reduce the general outlay. Besides this, many inhabitants of the towns have an interest in neighbouring farms, and procure their own wheat and barley, sometimes poultry, mutton, and butter as well. Dividing them into three classes, their household expenses per annum may be reckoned as follows:—

Class.	Per Annum.	
	From—	To—
	£	£
First	120	200
Second	50	60
Third	20	30

Furniture.

The furniture of most town houses consists of bedding, native carpets, and kitchen utensils. Chairs are replaced by fixed sofas running all round the room against the walls, into which spacious cupboards are built.

Tables are only to be found in Christian establishments.

Additional expenses.

The provincial and imperial taxes, which amount to about 2*l.* per head per annum in money and a tenth of produce in kind, are additional items of expenditure. Christians have further to support their respective church and school establishments by voluntary contributions.

Railway extension.

The province of Angora is an inland one, and has no seaport of its own. Its chief outlets have hitherto been Constantinople or Ismidt, Samsoun, and Mersina, but since the completion of the railway, in December, 1892, the traffic through these last two ports has been diverted, though not entirely, from the points in the region tapped by the railway, and which extends as far as Kotch-Hissar to the south of Angora, Kirsheir to the south-east, Yozgat to the east, Soungourlou to the north-east, Bey-Bazar to the north-west, and Sivrihissar to the south-west, at all of which places the railway company have commercial agents to collect and receive goods for conveyance by rail from Angora. A reduction of 22 per cent. is allowed on goods sent through these agents.

A mixed train is run backwards and forwards every day between Constantinople and Angóra, the time taken being 2 days, as the trains do not run at night.

Railway rates.

The single fares for passengers between Constantinople and Angora are:—

Class	Fares.		
	£	s.	d.
First	3	7	6
Second	1	14	0
Third	1	2	0

The somewhat high tariffs for goods, in vigour in March, 1894, are given in Annex C.

Roads.

The total length of roads, called "chaussées," in the province is 804 miles, besides which there are 84 miles in course of construction and 196½ miles commenced in 1893. The bridges along these roads number 1,476, of 2,534 yards length: 2 are of wood, 1,329 of stone, and 145 of wood and stone.

Water supply.

In the course of 1893 a new supply of water was brought to Angora from a spring in the Elma Dagh range, about 10 miles off, so that, with the old supply brought from near the source of the Enguri-Sou River and the numerous springs in the environs, that town is well furnished with pure water. The cast-iron pipes required for the above works were made in France and Belgium.

Bank.

The only banking establishment at Angora is the branch of the Imperial Ottoman Bank, opened in 1893, and affording commercial facilities the absence of which had been long felt.

Insurance offices.

There are two British and one Turkish fire insurance companies represented at Angora, the latter by the Imperial Ottoman Bank. The precaution of insuring house property and goods has, however, not been adopted to any appreciable extent.

Suggestions for the development of direct trade with United Kingdom.

In a preceding part of this report it has been stated that the import trade is almost entirely carried on through Constantinople firms. This is mainly owing to their knowledge of the financial position of local tradesmen and merchants to whom long terms of credit are allowed. The unforeseen difficulties usually encountered in various ways by inland tradesmen, who often through no fault of their own are unable to meet their engagements, are known to the Constantinople houses, and allowance is made accordingly. Notwithstanding these circumstances, the following arrangements, suggested by the perusal of a Belgian consular report, if found feasible by British export firms, might lead to the establishment of direct dealings between themselves and local customers, and to the extension of British trade in these parts.

1. Local requirements and the names of likely importers of British goods should be ascertained on the spot, and samples, not catalogues, should, when feasible, be distributed or exhibited by

commercial travellers or by a general agent of the British Associated Chambers of Commerce, whom it would not be impossible to find at Angora, and obviate the necessity of sending a specially-appointed representative from England.

2. When orders are made, information of the financial position of the would-be purchaser should be obtained from the branch office of the Imperial Ottoman Bank, which establishment is always ready to serve the interests of trade.

3. An arrangement should be agreed upon by which the bill of lading and invoice would be sent to the bank to be handed to the consignee on his settling the amount due on delivery, which the bank would duly remit to the shipper by bill after deducting its charges previously agreed upon.

4. In case the consignee fails to carry out his engagement to pay on delivery, the bank could retain the goods—for the warehousing of which it has the necessary accommodation—and, if necessary, it could dispose of them on and for account of the shippers to the best of its ability.

5. But if in the meantime the consignee does not refuse to accept the goods, but simply desires an extension of credit, it would be for the bank to allow it on its own terms and risk as a separate operation in which the shipper need not necessarily take any part, the bank taking his place by remitting him the whole amount due by the consignee, who would thus become a debtor of the bank under the usual conditions.

The foregoing is only an outline of the mode of operations suggested, and would require specification as to details of procedure, which could be done either direct with the bank or through Her Majesty's consulate if the idea in principle is considered feasible by British manufacturers, who have often to complain of the unreliability of foreign customers in the east, which would be checked, whilst local merchants who possess the necessary capital or credit would, it is supposed, appreciate the saving they would effect by direct dealings which are calculated to counterbalance the benefits derived from the accommodating terms offered by Constantinople firms.

At present a demand for iron-ware, especially kitchen utensils, exists at Angora, and, owing to the lack of hand labour, reapers and mowers might be successfully introduced if their advantages were made known to local farmers. Light ploughs might also find a sale.

Annex A.—TABLE showing the Average Market Prices of the Chief Articles of Export at Angora in 1893.

Articles.		Price. From—			Price. To—			Remarks.
		£	s.	d.	£	s.	d.	
Cotton	Per lb.				0	0	3½	
Wool	„				0	0	4	Unwashed.
„	„				0	0	8	Washed.
Mohair	„	0	0	11	0	1	4	
Goat and sheep skins	Each	0	0	7	0	1	7	
Goat skins (mohair)	„	0	4	6	0	7	3	Undressed, with the fleece on.
„ „	„	0	7	3	0	10	0	Dressed.
Hides	„	0	5	6	0	7	3	Salted
„	„	1	0	0	2	10	0	Buffaloes, dressed.
Morocco leather	Per piece	0	3	0	0	4	0	First quality, all colours.
„ „	„	0	1	2	0	2	0	Second quality, all colours.
Rice	Per lb.	0	0	1	0	0	1½	
Butter	„	0	0	7	0	0	8	
Wheat	Per bushel	0	2	2	0	3	1	Prices in March, 1894.
Barley	„	0	1	10	0	2	0	„ „
Flour	Per lb.	0	0	0½	0	0	0¾	
Gum	„	0	1	6	0	1	10	First quality, white.
„	„	0	1	3	0	1	7	Second quality, yellowish.
„	„	0	0	9	0	0	11	Third quality.
Opium	„	0	6	6	0	10	0	
Yellow berries	„	0	0	2	0	0	2½	
Linseed	„		..		0	0	0¾	
Rye	Per bushel	0	1	8	0	1	10	
Sof (mohair fabric)	Per yard	0	7	3	0	7	6	Best quality.
„	„	0	3	0	0	4	0	Good quality.
„	„	0	2	6	0	3	0	Inferior quality.
Wine	Per gallon	0	1	1	0	1	3	
Raki (spirits of wine)	„	0	2	3	0	3	3	
Grapes	Per cwt.	0	1	10	0	5	6	According to quality.
Apples and pears	Per lb.	0	0	1	0	0	2	
Apricots	„	0	0	0½	0	0	1	Dried.

Annex B.—TABLE showing the Traffic on the Anatolian Railway between the Stations of Angora and Constantinople-Ismidt in the Year 1893.

Stations	Goods		Passengers		Animals
	From Angora to—	To Angora from—	From Angora to—	To Angora from—	From Angora to—
	Tons.	Tons.	Numbers.	Number	Waggons
Constantinople	[illegible]	3,411	4,[illegible]	3,[illegible]	99
Ismidt	[illegible]	192	1,[illegible]	2,[illegible]	2
Total	23,[illegible]	3,[illegible]	[illegible]	6,[illegible]	95

Annex C.—TABLE showing the Goods Tariffs on the Anatolian Railway in March, 1894.

Goods.	Stations.		Rate.	Quantity.
	From—	To—		
			£ s. d.	
Cereals	Angora ..	Ismidt ..	1 4 8	Per ton of 1,000 kilos.
,, ...	,, ..	Constantinople	1 8 10	Per ton of 1,000 kilos.
Fruit, mohair, &c.	,, ..	Ismidt ..	3 17 4	Per ton of 1,000 kilos.
,, ,,	,, ..	Constantinople	4 16 5	Per ton of 1,000 kilos.
Horses and camels (in small numbers)	,, ..	Ismidt ..	5 13 6	Per head.
Horses and camels (in small numbers)	,, ..	Constantinople	7 1 9	,,
Horses and camels (in large numbers)	,, ..	Ismidt ..	2 19 8	,,
Horses and camels (in large numbers)	,, ..	Constantinople	3 11 0	,,
Oxen, buffalos, sheep, goats, pigs	,, ..	Constantinople	17 8 0	Per waggon load.
General merchandise	Ismidt ..	Angora ..	3 18 2	Per ton of 1,000 kilos.
General merchandise	Constantinople	,, ..	4 13 3	Per ton of 1,000 Kilos.

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No. 1384.

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TURKEY.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF THE DISTRICT OF THE CONSTANTINOPLE CONSULATE-GENERAL.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1224.

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1347.	Algiers	3d.
1348.	Amapala	½d
1349.	Cherbourg	1d.
1350.	Jerusalem	1d
1351.	Santiago	1d.
1352.	San José	1d
1353.	Trieste	3½d.
1354.	Madrid	2d
1355.	Teneriffe	½d
1356.	Havana	2d.
1357.	Paraguay	5d.
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1359.	Cadiz	1½d
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1374.	Nantes	1½d.
1375.	Taganrog	2½d.
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Reference to previous Report, Annual Series No. 1224.

TURKEY.

CONSTANTINOPLE.

Acting Consul-General Wrench to the Earl of Kimberley.

My Lord, *Constantinople, May* 10, 1894.

I HAVE the honour to enclose a Report, drawn up by Mr Assistant Dragoman and Vice-Consul Waugh, on the Trade and Commerce of Constantinople, for the year 1893.

I have, &c.

(Signed) WILLIAM H. WRENCH.

Report on the Trade and Commerce of Constantinople for the Year 1893.

ABSTRACT of Contents.

	PAGE
Custom-house statistics for Turkey	2
English percentage of trade	2
German and Belgian import trade	2
French import trade	3
Table for 1891	4
Outlook of trade	4
Articles of export—	
Opium	4
Mohair	5
Sheep's wool	5
Yellow berries	5
Gum	5
Anatolian wool	5
Barley	5
Port of Ismidt	6
Flour and wheat	6
Agriculture	7
German export association	8
Coal	8
Turkish Exhibition	9
Fire insurance	10
Stamp law	10
Cholera	11

Abstract of Contents—continued.

	Page
Quarantines	12
Visa on bills of health	13
Constantinople quays	14
Cigarette export company	17
Shipping statistics	17
Reports from Vice-Consulates in Constantinople district—	
Gallipoli	20
Dédéagatch	20
Scutari	21

Custom-house statistics for Turkey.

The custom-house statistics for the Turkish financial year ending February 28, 1892, which have just been published, and than which nothing more recent is obtainable, give the total exports from the whole of Turkey as 13,972,773*l.*, and the total of imports into Turkey as 22,321,763*l.*

These figures show an advance on those of the preceding 5 years, which I give below:—

Year.	Value.	
	Exports.	Imports.
	£	£
1886..	11,552,086	18,821,119
1887..	10,262,846	18,278,139
1888..	12,314,581	17,687,867
1889..	13,884,027	19,128,656
1890..	11,669,524	20,831,222

English percentage of trade.

Out of the 2,303,249*l.* excess in exports over the preceding year, England accounts for 1,863,642*l.*, bringing her percentage of the export trade of Turkey from 37·5 per cent. up to 44·7 per cent.

On the other hand English imports into Turkey only increased by 253,044*l.*, out of a total increase of 1,490,541*l.*, which brings the percentage of the import trade falling to England from 43·3 per cent. down to 41·6 per cent.

The most remarkable point about these statistics, of which I give a summary below, is the enormous variation in the trade with Egypt. Egypt is credited with an increase of over 500,000*l.* in her imports; and took in 1891, 618,235*l.* less of exports than in the preceding year.

In fact the exports from Turkey to Egypt dwindled from nearly 900,000*l.* in 1889 to 5,000*l.* in 1891.

German and Belgian import trade.

The countries which show the greatest proportionate increase in their imports are Germany and Belgium; the former having nearly trebled her total for 1890, while Belgium made an advance of nearly 30 per cent. Their totals are, however, comparatively so insignificant that this increase is not surprising.

Germany is credited with 167,581*l.* worth of imports, and Belgium with 587,967*l.* It must be borne in mind, in estimating

the value of Germany's import trade into Turkey, that a large amount of German goods is imported from non-German ports; and as explained further on, this amount does not appear in the tables.

It is, I think, admitted all round that German goods are being imported in much larger quantities of late years.

The hold which German enterprise has obtained over the railways in Turkey has done much to spread German trade. The German colony in Constantinople has increased visibly, and with it, naturally, the demand for German goods.

A large amount of railway material has been brought from Germany in the last year or two, which, being exempt from duty, does not appear in the table; German beer is largely drunk, and cheap German goods and stuffs find favour with the natives.

The old story, told in so many trade reports, is heard here too, that German manufacturers pay more attention to the wants of their customers, and take more trouble to suit them.

This point is being constantly impressed by the French Chamber of Commerce here upon its countrymen.

All said and done, however, I do not find that German trade has yet succeeded in ousting British to any appreciable extent.

In 1880 the proportion of British imports was 42·6 per cent., in 1891 it was 41·6 per cent.

The Turkish custom-house statistics are arranged according to the ports of shipment of the goods, so that it is impossible to separate German imports from Austrian, Belgian and Dutch, as a certain quantity of German goods are shipped from Trieste, Antwerp, and Rotterdam.

Taking these four countries together, they imported in 1891 22·6 per cent. of the total, as against 23 per cent. in 1890.

French imports amounted to:— French import trade.

Year.	Per Cent. of Total.
1888..	12·9
1889..	12·0
1890..	12·4
1891..	12·3

showing little variation.

I repeat that these figures represent the trade of the whole of Turkey. No statistics are published for Constantinople alone, and I have not yet been able to hit upon any means of obtaining even approximate figures for the trade of the capital.

Country.	Exports.		Imports.	
	1891.	Difference on Previous Year.	1891.	Difference on Previous Year.
	£	£	£	£
England	6,239,112	+ 1,863,642	9,273,754	+ 253,044
Germany	127,238	+ 21,238	167,581	+ 110,076
Austria	1,111,154	+ 166,201	4,179,256	— 8,649
Italy	494,231	— 9,594	524,534	+ 70,188
Spain	3,694	— 315	52	+ 52
Persia	13,869	— 1,240	593,829	+ 62,005
Sweden	50	+ 50	60,558	+ 26,321
America	211,648	+ 45,625	29,504	— 38,398
Belgium	28,279	+ 16,928	587,967	+ 132,448
Denmark	2,893	+ 1,800	121	+ 73
Russia	230,285	— 36,336	1,699,781	+ 150,864
Roumania	264,708	+ 48,335	417,986	— 6,225
Servia	46,828	+ 6,166	65,926	— 15,977
Holland	214,475	+ 62,291	110,657	+ 11,085
France	4,097,275	+ 704,468	2,746,703	+ 170,700
Montenegro	4,250	— 881	7,565	+ 2,725
Greece	497,995	+ 32,488	384,413	+ 60,307
Egypt	5,086	— 618,235	561,038	+ 503,972
Bulgaria	366,051	— 4,607	854,640	— 13,986
Samos	2,605	— 5,808	925	+ 405
Tunis	2,000	+ 1,271	55,720	+ 19,557
Total	13,972,773	+ 2,303,249	22,321,763	+ 1,490,541

Outlook of trade.

The outlook of trade just now is gloomy.

The cholera scare and the quarantines have hampered enterprise.

I am told that there has been during the last few months a diminution of 30 per cent. in the trade passing through the custom-house here. In view of an outbreak of cholera this summer, and a consequent exodus of all the wealthy people, merchants are afraid to accumulate large stocks. Many orders have been countermanded. This is especially the case with colonial wares, silks, and other luxuries.

Articles of export—Opium.

Last season's crop was much damaged by the severe frosts in the Konia district in February and March, 1893, and only yielded 2,700 cases (of 145 lb.) as against 7,200 cases in 1892.

The export from Constantinople last year was 1,300 cases, of which 800 cases to America, 200 cases to Amsterdam, and the rest to England and the Continent.

Prices at the beginning of the year were 6*s.* 8*d.* per lb. f.o.b. here, and rose in March to 12*s.* per lb., then varied to 8*s.* per lb. and 11*s.* per lb. and closed at 8*s.* 6*d.* per lb. at the end of last year.

Beginning this year at 8*s.* 6*d.*, prices were run up to 11*s.* per lb. by heavy sales here and in Smyrna, consequent on the rumour of a duty of 1 dol. per 1 lb. to be imposed in the States. Since January 1, 500 cases have been shipped from here to America. Prices now stand at 10*s.* per lb. (March 13).

The new crops have been damaged by frosts, and are not expected to give more than 5,000 cases. The stock left in Turkey now is from 1,500 to 1,700 cases.

Mohair. The severe cold in the winter of 1892-93 killed off many of the kid goats, which yield the best wool, so that the clip this May will probably be rather short. Last season's clip gave 35,000 bales.*

The export from May 1 last till now (March 13) has been 30,000 bales, all to England. Prices began last season at 1*s.* 4*d.* per lb., and rose in June and July to 1*s.* 8*d.* They now stand at 1*s.* 3*d.* This is a great advance over last year's prices which varied from 10¾*d.* to 1*s.* 2*d.*

The stock left in the country now is from 12,000 bales to 14,000 bales.

Sheep's wool. This year's yield of "Kassab bashi" (pulled wool) is from 4,500 bales to 5,000 bales of 300 lbs. Some 4,000 bales are now being shipped to England; the rest is taken by the Government for local consumption. Prices are as follows:—

Description.	Price per Lb.*
	d.
1st whites	7½
2nd whites and 1st colours	6
3rd whites and 2nd colours	4½
3rd colours	3½

* Delivered in England.

Yellow berries. Arrivals on this market:—

Year.	Number of Sacks.
1892..	4,800
1893..	2,600

Prices fell last year from 1*l.* 18*s.* to 1*l.* 12*s.* per cwt. for good qualities, and from 1*l.* 10*s.* to 1*l.* 3*s.* per cwt. for inferior.

The demand for this article becomes less year by year.

Gum. Arrivals on this market last year 4,300 sacks, as against 3,400 sacks in 1892.

Prices at present are 13*l.* to 14*l.* per cwt. for best qualities.

Anatolian wool. The clip last year was from 5,000 bales to 6,000 bales, a good part of which was taken by the Government; some 2,500 bales went to America.

Barley. The opening of the Anatolian Railway to Angora has enabled growers in the interior to bring down their produce to the sea, and a new trade has sprung up at Ismidt within the last year. Last

* 1 bale = 180 lbs.

year 70,000 quarters of barley of 400 lbs. were shipped from Ismidt to England.

The Eskishehr barley is of good quality, almost as good as Smyrna ushaks; in fact a good deal of it was taken to Smyrna, at an extra expense of 5 per cent., and sold there as ushaks for export to England.

The prices began at 1*l.* 4*s.* 6*d.* for Eskishehr barley, c.i.f., any port in England; and dropped later to 1*l.* 2*s.*

This trade with the interior promises to develop. Last year's crop of linseed was a failure, and the prices for wheat were too low to tempt sellers; otherwise both these cereals, and maize also, could be brought down in large quantities.

Port of Ismidt.

Ismidt is very conveniently situated for this trade, being at the head of a land-locked gulf, and on the railway 58 miles from Constantinople. Vessels can lie there and load with greater facility than in this port. They have to load from lighters in either case; and the strong currents and eddies in the Bosphorus, and the crowded state of the port cause great inconvenience here.

Even should the quays be built here and provided with elevators, the grain would still have to be conveyed in lighters from the railway terminus at Haidar Pasha across the Bosphorus to the quays, and so handled twice.

If this trade develops as it should, I think we may look to Ismidt becoming the outlet for it.

Complaints are made against the German company which holds the railway, that it affords very slight facilities to exporters, especially in the matter of warehouse accommodation, for which it charges exorbitant rates.

Flour and wheat.

The consumption of Constantinople is estimated at 4,000 bags of flower per day,* or 1,460,000 bags per annum.

	Number of Bags.	Remarks.
Imported last year	360,000	Three-fifths from Russia, and two-fifths from Roumania and Bulgaria.
Produced by the Government mills	200,000	
„ „ private mills ..	900,000	
Total	1,460,000	

The wheat used by these mills comes from Russia, Roumania and Bulgaria, except about one-fifth which comes from Turkish ports on the Black Sea and Marmora.

The most recent custom-house statistics published give the imports and exports of wheat and flour for the whole of Turkey for the years 1890 and 1891 as follows (to which I add an unofficial, but reliable, estimate of the imports into Constantinople for last year):—

* 1 bag of flour = 165 lbs.

	Imports.		Exports.	
	Quantity.	Value.	Quantity.	Value.
	Lbs.	£	Lbs.	£
1890.				
Wheat	80,891,014	551,394	196,617,480	1,163,267
Flour	84,063,802	415,538	2,119,138	9,127
1891.				
Wheat	39,806,154	348,777	262,077,420	1,601,946
Flour	96,221,058	589,133	1,253,208	6,100
1893.				
Wheat	145,200,000	..	..	..
Flour	59,400,000	..	..	..

From these figures it appears that the importation of wheat and flour last year into Constantinople alone considerably exceeded the total importation into Turkey of 1890 and 1891. It is estimated that of the foreign wheat and flour imported into Turkey about 85 per cent. is consumed in the capital, the rest of the country supplying itself.

The amount of wheat required to feed the population of Turkey is estimated at 13,600 million lbs., of which 240 million lbs. are required for the capital.

The representatives of the milling interests in Constantinople have recently petitioned for the imposition of a protective duty on foreign flour. This, however, can hardly be granted, in view of the treaties existing with foreign Powers.

Agriculture.

It seems a curious fact that agriculture in European Turkey and round the capital is more backward than in other parts of the Empire. In Bulgaria I am told that agricultural machines are being extensively introduced; and they are also found near Smyrna and at Mersina. In Constantinople the sale is most restricted. The native farmer is ultra conservative in his methods, and requires much persuasion to overcome his dislike to Frankish contrivances which he will not take the trouble to understand, and which, once broken, are difficult to repair. Even when he sees a reaping machine working, and recognises its superiority he is not convinced. The pity is that those who should set an example, and encourage the people to improve their methods, have not the will or the energy to do so.

I was told of a Turkish farmer, up country, who, after watching a reaping machine at work, exclaimed, "If these things are so good, why does not our Padishah show them to us?" It might certainly

be thought that the introduction of simple suitable machinery would come within the scope of the Minister of Agriculture's duties. There are farms near Constantinople belonging to the Sultan, administered by the Minister of the Civil List. Some years ago the bailiff in charge had several machines working, and invested in others. He was removed or died, and his successor has returned to the old primitive methods.

The opening of the country between here and Angora, and the development of agricultural activity which is resulting from it, should lead to an increased demand for machines.

The most suitable for this country, where the ground is very rough, and gets baked hard in the summer, are not necessarily those preferred in England.

This is a point which English makers either lose sight of, or do not think it worth their while attending to.

One instance of this is that the reaping machines which give most satisfaction are American.

They are lighter than the English, and the iron work is not so brittle, and is better able to stand the hard usage over the rough ground.

Quick reaping is of great importance here, as the grain ripens very quickly.

German Export Association.

There is a German association established here since the last two or three years, which shows every intention of actively pushing the sale of German machinery of all sorts.

It is called the "Export Verband Deutschen Maschinenfabrik und Hüttenwerke" (Export Association of German Engineering Works), and was established in Berlin some three years ago.

It represents over 100 German firms, and sells none but German goods.

The association has premises in Galata, where specimens of various machinery can be seen, ploughs, traction engines, pumps, &c., and show rooms full of all kinds of tools and implements.

There is an engineer attached, who undertakes to explain the use and mechanism of the different machines. I was told that the intention is later to send travellers up country with specimen machines to show them off.

The idea is good, and there seems every disposition to take pains to ascertain what is required, and to supply it.

If British makers only took as much trouble they ought to be able to hold their own; for the general opinion seems to be that the English articles are better made and last much longer; and it is, I think, possible to find Englishmen to act as agents, who know the country better, and have had more experience of the native character—qualities of immense importance in an agent here—than their competitors.

Coal

The privilege of storing coal in bond to supply steamers was originally granted by the Turkish Government to the French, Austrian, and Russian regular mail companies in return for carrying the Turkish mails. It was then extended to the recognised

agents of certain English ss. companies, and there are now some five or six British ship agents who have bonded stores.

Thus the bulk of the coal brought here pays no duty.

Last year 461,132 tons of English coal were brought to Constantinople, of which only about 100,000 tons figure in the custom-house returns as having paid duty.

This represents a large amount of business. In fact, the ship broking and coaling trade is one of the most flourishing in which British merchants here engage.

The custom-house authorities regard the bonded store system with disfavour, as depriving them of a certain revenue, and as affording facilities for contraband.

Recently, the director of the custom-house endeavoured to put in force new regulations establishing a stricter control, the cost of which was to fall on the trade. In the event of his scheme not being accepted by the foreign merchants, he claimed the right to withdraw the privilege of bonded stores, and to treat the coal as goods in transit, which pay the regular 8 per cent. ad valorem import duty, and receive a drawback of 7 per cent. if re-exported within six months.

The innovation was, however, successfully resisted; and the question remains, like many others, in abeyance.

The merchants maintain that any additional burden laid on the trade, already handicapped by high store rents, heavy cost of discharging, and want of quay accommodation, would drive it away to Malta, Syra, or the Piræus.

I give a table of the quantity of English coal imported into Constantinople, and taken up to the Black Sea during the last three years.

Year.	Quantity.		
	For Constantinople.	For Black Sea.	Total.
	Tons.	Tons.	Tons.
1891	589,397	350,387	939,784
1892	473,266	401,657	874,923
1893	461,132	380,420	841,552

Turkish exhibition.

It has been decided to open a national exhibition in Constantinople.

A special tax has been levied producing a yearly revenue of 20,000*l.* T. On security of this revenue a loan is to be raised to provide the necessary funds.

The exhibition is to be held at Chichli, a suburb of Pera. The plans have been prepared, and a model of the buildings to be erected was presented to the Sultan on his last birthday.

The "Règlement" of the exhibition was published last October. The day of opening remains to be fixed later by Imperial decree.

The exhibits must be native products, with the exception of agricultural and industrial implements of proved utility.

All exhibits are exempted from custom-house duties, both of import and export, unless sold in the country.

Fire insurance.

420 buildings, of which 380 were wooden, are reported to have been destroyed by fires last year. The indemnities paid by the various insurance companies doing business here amounted to 61,830*l.*, of which 31,205*l.* was divided among 14 English companies.

There are 17 British offices represented here, 1 Austrian, 1 Belgian, 1 Dutch, 4 French, 7 German, 1 Greek, 2 Italian, 1 Roumanian, 1 Russian, 1 Swiss, and the newly established Ottoman Insurance Company.

It is estimated that during the 10 years ended December 31, 1892, the Constantinople public paid for fire insurance an average of 85,000*l.* per annum, the amount insured being about 12,000,000*l.*

Of this premium income the British offices received about 45,000*l.*, and the continental offices the remaining 40,000*l.* The business left an average profit of about 25 per cent.

The better class of business was originally almost exclusively in the hands of the British offices, which were the first in the field, and secured the confidence of the public by their prompt and liberal settlements.

The continental offices, finding it extremely difficult to secure business on the same terms as the British, proceeded to lower rates. In due course, on its being discovered that many of the continental offices could be relied on for prompt and equitable settlements, a current set in in their favour.

The British offices felt its effect for many years before coming to a decision respecting a thorough revision of their rates.

This was at last decided, and came into force on May 1, 1893, shortly after the establishment of the Ottoman Insurance Company described in my report last year.

The reductions made are said to have been too great for the conditions of insurance in Constantinople, amounting in some cases to 50 per cent. They have failed to secure the object aimed at, namely the monopoly, previously enjoyed, of the better class of business.

The continental offices immediately followed suit, accepting, when necessary to hold their own, even lower rates than the reduced tariff of the British offices. They have thus lost little ground, if any.

The Ottoman Insurance Company adapted its rates to the reduced tariff; and the only effect of the cut-throat policy adopted seems to be a general reduction in the premium income all round. That falling to the share of the British offices is estimated at about 37,000*l.* per annum as against 45,000*l.* before the reduction of rates.

Stamp law

The Turkish Government has, after more than 10 years of

negotiation, obtained the consent of the foreign missions to the new Stamp Law.

This Law came into force on March 20.

Foreign subjects are equally subject with natives to its provisions.

It taxes all kinds of negotiable instruments, legal documents, &c., such as bills of exchange, cheques, bills of lading, insurance policies, shares in companies, petitions to the law courts, judgments, receipts, contracts, &c. The tax is a fixed one for certain specified documents; and a proportionate amount, calculated on the sum involved, in others, at a rate varying from $\frac{1}{2}$ per cent. for small sums to $\frac{1}{20}$ per cent. for large.

The stamp revenue, which is one of those ceded to the bondholders, produced in 1892 193,520*l.* A considerable increase in the revenue is expected from the application of the tax to foreigners, a great part of the commercial transactions in Turkey being in their hands.

Cholera.

The cholera epidemic in Turkey last year is traced to the return of the decimated Turkish troops from the Yemen, who spread the disease in Mecca and Jeddah, where it raged to a fearful extent last year.

The pilgrims returning from Mecca then brought it back with them to Smyrna and Constantinople.

There was also infection from Roumania; but, according to some authorities, this source of infection was isolated in time, and rendered harmless.

The figures of the mortality in Jeddah are appalling. According to the official lists 94,963 pilgrims arrived in that port, and only 53,972 left on the return journey. Out of 8,917 Turkish pilgrims 5,970 started back. The Doctor appointed by the Austrian Government to take charge of the Bosnian pilgrims brought back 61 out of 120.

The writer of the article, from which I take these figures, directly traces the outbreak of the disease in Smyrna and Constantinople to the return of the pilgrim ships.

The first ship arrived on August 20 with 604 pilgrims, followed on August 21 and August 23 by two others. On August 29 the cholera made its appearance in the lunatic asylum at Scutari. It had already broken out at Smyrna; where a regular panic set in, and large numbers of the inhabitants left their houses and took refuge in the country, some of the quarters of the town presenting a quite deserted appearance.

The disease in the capital spread chiefly at first among the Turkish population, in the lunatic asylum and the barracks, among the sailors and the marines. Only later did it attack the Jewish quarters and the villages on the Bosphorus. From August 24 to November 4, 386 cases were reported, of which 80 per cent. were fatal. November was a hot month with sultry south wind, and the disease spread with increased vigour. From November 5 to December 30 the number of cases reported was 1,616, of which 889 were fatal. It is said that these official figures are fairly accurate as regards

the number of deaths, but that the number of cases must have been much greater, many being suppressed.

January was a dry fine month with cold nights, and the disease seemed to be dying out. Unfortunately in February it revived slightly, and is not yet extinct.

The number of deaths recorded, about 1,200, in proportion to the population, roughly estimated at 800,000, is insignificant. This small mortality is surprising.

Constantinople is magnificently situated, on steep hills running down to the sea, with a constant north breeze and strong current down the Bosphorus to carry away all impurities; yet the squalor of the lower quarters of the city, and the absence of any system of drainage would seem to expose it to great danger from an outbreak of cholera.

The Government was alarmed, and a commission was appointed to protect the city.

Beyond sprinkling disinfectants in the streets, sanitation was hardly attempted; but great stress was laid on quarantine measures, both in keeping away arrivals from infected districts and in isolating the inmates of infected houses.

An expert from Paris was summoned and spent some weeks here. He reported that the drainage system or want of it, was abominable, and that the water supply was bad; but beyond this, and certifying to the genuine character of the disease, he was not able to do much.

There are excellent springs of water round Constantinople, which are drunk by the better class Turks; but the water supplied to the bulk of the population is far from pure.

Official notices were published in the papers warning people to boil their water, and to take other precautions; melons and tomatos were forbidden to be sold, and quarantines were enforced in all directions.

Quarantines.

A striking instance was that of the pilgrim ship "Abdul Kader," which left Jeddah on July 4 with 1,370 pilgrims. She arrived at Tor, in the Gulf of Suez, on July 8, and performed quarantine there till August 9 with the loss of 167 passengers; underwent a further quarantine of 15 days at Beyrut, with 107 more deaths; arrived at Clazomene, in the Gulf of Smyrna, on August 28, and was kept there in quarantine till September 30, and finally arrived in Constantinople on October 2.

During 1893 over 120 quarantine notices were issued in Constantinople and posted in this consulate.

Many of them are very complicated, not to say contradictory, and they are modified and recalled so frequently that no one can tell from one day to another to what quarantine any vessel arriving is subject.

The regulation of the quarantine is nominally in the hands of the International Sanitary Board of Turkey, established in 1840, and charged with "reconciling as far as possible sanitary guarantees with the interests of commerce," and with providing necessary lazaretto accommodation and a staff of doctors and health officers.

The Board is, however, an unwieldy machine, from its size and heterogeneous composition; and the European delegates have very uphill work to carry through any reforms.

The principal points to which attention might be called, in view of a possible serious outbreak this summer, are the following:—Ships coming down from the Black Sea, or up from the Mediterranean, bound for non-Turkish ports and not touching at Constantinople, are allowed to pass through the Straits of the Bosphorus and Dardanelles, with sanitary guards on board, in quarantine. If, however, such ships, on arriving at the mouth of the Bosphorus or of the Dardanelles, have a case of cholera on board, they are not allowed to pass through, but are sent back to Sinope or to Clazomene to perform quarantine. In the same way, if cholera occurs on board such a ship in transit between the Bosphorus and the Dardanelles, it is detained and sent to perform quarantine with Turkish sanitary guards on board, even though bound for a non-Turkish port.

This is contrary to common sense, and an unwarranted interference. Then again the medical inspection at Kavak is a farce. The doctor does not go on board, but examines the patient from a boat at a safe distance; and it has happened that vessels have been sent back all the way to Sinope to perform quarantine when there was no cholera on board at all.

The medical inspections and the disinfections are all a farce. The sanitary officer comes on board with a hand-pump, and squirts a little carbolic water over each member of the crew and each passenger in turn. The stoves used for disinfecting clothes are inefficient, the men in charge not being competent to see that the necessary temperature is kept up.

There is no hospital accommodation for cholera patients in the event of a serious outbreak, which most authorities regard as imminent this summer.

The lazaretto accommodation at Kavak and the Dardanelles is badly arranged and insufficient. Lastly, the point, perhaps, of most interest to shipping, the anchorage at Kavak for ships performing quarantine is crowded and dangerous. All ships passing have to stop there to show their papers, and numerous collisions occurred last year in consequence.

The alternative anchorage at Biyukliman is equally objectionable. It has been proposed to allow ships to perform their quarantine in Umur Bay, a little lower down, as they used to before, and the question is being taken up by the Foreign Office.

Visa on bills of health.

An attempt was made last year by the Turkish Government to compel ships to have their bills of health revised by the Turkish Consul at the port of departure.

The question had been raised before, but adjourned pending a contemplated revision of the sanitary tariff. This revision has never taken place, and on this ground the Embassy refused to accept the visa regulation, notice of which had been officially published in the papers by the Ottoman Consulate in London.

The result was that the matter has been again dropped, and that British ships require no Turkish visa to their bills of health.

Constantinople quays.

In spite of the universal scepticism with which the enterprise of constructing quays here was viewed at the outset, the Quay Company has already made a fair start. It has been working now for over 2 years, and has built some 400 feet of rough outer wall in the sea, and is now filling up the space between this wall and the shore.

The company has encountered difficulties in the vested interests of the waterside occupants, whose access to the sea has been cut off by its building operations, but it has been supported by the Government, and has, so far, triumphed over all opposition. What has been accomplished as yet is but the very beginning.

By its concession the company is to construct 3,000 metres of quay.

	Outside the Bridges.	Between the Bridges.	Total.
	Metres.	Metres.	Metres.
On the Galata side	770	810	..
On the Stamboul side ..	390	1,030	..
Total	1,160	1,840	3,000

It is a gigantic undertaking; the water is very deep close in shore, and the whole waterside is crowded, and there are vested interests of all kinds and all nationalities to be reckoned with.

The contract between Michel Pasha, the concessionary, and the Minister of Public Works was signed November 7, 1890, and was published in the local papers at the time.

The following is a résumé of the conditions of most interest to the public:—

Art. 1. The Imperial Government grants to Michel Pasha a concession for the construction and working—

(*a*) Of quays on both sides of the Golden Horn, on the Galata side, from Topkhane to the inner bridge, and on the Stamboul side from Sirkedji to the inner bridge.

(*b*) Of docks and goods depôts to be built as required.

The company is to have the right of storing goods in bond.

Art. 4. The company to start work within 2 years, and to finish it within 14 years; and at the commencement of the eighth year to start work on the portion of the quay between the bridges.

Art. 6. The work being one of public utility, all the land required will be taken. If the company is unable to come to terms with the owners the Expropriation Law will be applied.

Art. 22. The company is to erect stone buildings for the new custom-houses, health office, port office, &c., to be handed over to the Government free of charge. In return the Government will make over to the company, as the work proceeds, the ground and buildings of the present public offices above-named.

Art. 23. In return for the outlay incurred the company is authorised to levy, during the whole period of its concession (85 years), the following charges:—

1. Quay dues for ships lying alongside.
2. Quay dues on goods loaded and discharged.
3. Warehouse dues.
4. Subscriptions for passenger boats, tugs, and lighters using the quays regularly.
5. Tolls and fares on the steamboat, railway, tramway, omnibus, and luggage truck services which the company is free to establish.

Those who refuse to accept the company's terms ("les opposants") will only be able to embark and discharge their goods outside the quays constructed by the company.

The company has no right to claim compensation from the Government in the event of a refusal to pay the dues.

Art. 25. The company will pay into the Imperial Treasury, at the end of each year, 10 per cent. of the total gross receipts.

Art. 28. The concessionary and the company which is to take his place being required to be Ottoman, all disputes come before the Ottoman tribunals.

The length of quay thus provided for is 1,160 metres outside the bridge, and 1,840 metres between the bridges.

It is proposed to moor vessels broadside on, but if there is not sufficient accommodation they will be moored stern on, and pontoons with rails communicating with the quay will be provided on each side, so as to afford equal facilities for taking in and discharging cargo.

It is evident that some such arrangement will be necessary; the 1,160 metres of quay outside the bridge would not accommodate more than 10 or 12 vessels broadside on; passing inside the bridge entails considerable delay and expense; and if the discharging is to be done into lighters alongside, as is the case at Smyrna, very little benefit is derived from the quays.

The company's charges, authorised by Art. 23, have been tariffed as follows:—

Every steamer, sailing ship, and lighter moored to the quay shall pay 1 fr. per register ton for the time necessary for discharging or taking in cargo. Cargo to be worked at the rate of at least 75 tons per day, under pain of a supplementary charge.

Passengers embarking or landing pay—

Class.	Each.
	Piastres.
First	5
Second	3
Third	1½

Precious metals, stones, and other valuables pay 1 fr. per 1,000 fr. value declared on manifest.

Special scales are provided for rolling stock and animals.
Goods are divided into three classes :—

Class.	Per Ton.		Remarks.
	From—	To—	
	Piastres.	Piastres.	
First	10	50	When landed on, or embarked from the quay
Second	5	25	
Third	3	17	

NOTE.—1 piastre = 2*d*.

For warehouse dues :—

Class.	Per Ton per Month
	Piastres
First	80
Second	50
Third	20

And the same charge (paid once) for being put into and taken out of warehouse.

These charges are generally criticised as excessive, and as calculated, if enforced, to drive away the trade of this port.

It is said, for instance, that, under this tariff, cotton yarns (one of our most important transit articles), which comes under Class I., would pay, say, 30 pias. per ton for discharging and the same for loading, so that this article, transiting here for Varna, would pay 60 pias. per ton for an operation which is performed to-day by lighters for 5 pias. or 6 pias.

Again, the warehouse charges for Class I goods are 80 pias. per ton per month, with another 80 pias. for going in and coming out of the warehouse. Assuming the goods to be warehoused for 4 months, the charge is calculated to amount to 6 per cent. of the value for yarns of the low kinds most in vogue.

The detailed tariff is only to be published 2 or 3 months before the opening of the quays.

So long as the use of the quays is optional, and vessels are left free to discharge into and load from lighters in the port, as at present, no one can object to the company framing its own tariff in its own way. If the charges are excessive it will be the sufferer. But it is not at all clear that there will be any alternative for shipping but to use the quays.

Art. 23 says that "les opposants" will only be able to load and discharge cargo outside the quays constructed by the company. But the custom-house itself is to be within the limits of the company's territory ; and how are goods to be landed at the custom-house without passing over the company's quay ?

This is a point which has not yet been elucidated at all.

The company's view is that the advantages offered by the quays will be so great that everybody will wish to profit by them; and that, in any case, if there are any opponents they will find difficulty in loading their goods outside the quays, as, these once completed, there will be no place where such operations could be allowed.

The Quay Company is an Ottoman joint-stock company, with a capital of 23,000,000 fr., which is being called up in small payments as required.

Turkish Régie Export Company, Limited.

This Company was formed in April, 1893, with the object of manufacturing and exporting Turkish tobacco and cigarettes.

It has a contract with the Turkish Tobacco Régie Company, by which, in consideration of a fixed annual payment and 14 per cent. of the net profits, it has the right to manufacture in Turkey cigarettes and tobacco for export.

The annual payment to the régie is fixed at:—

Year.	Amount.
	£
First	4,000
Second..	5,000
Third	7,000
Fourth and fifth	8,000
Each subsequent year	10,000

It has to buy its leaf tobacco from the régie at cost price plus 10 per cent. profit, which the régie makes. Its contract with the régie holds good for the whole term of the latter's own concession, which expires on April 14, 1914. The right to manufacture tobacco and cigarettes in Turkey being part of the monopoly enjoyed by the régie, the new company has this advantage over all its competitors in the export trade, who have to export the tobacco in its raw state and manufacture it elsewhere. This is done extensively in Egypt; the better qualities of the so-called Egyptian cigarette being made entirely from tobacco grown in and exported from Turkey.

Whether the advantage of manufacture in Turkey is worth the price paid to the régie remains to be seen. The direct exportation and sale abroad of Turkish cigarettes is a branch of its business which has hitherto been strangely neglected by the régie.

The capital of the new company is 100,000*l.* in 1*l.* shares.

It was subscribed by a syndicate, and offered to the public at 5*s.* premium per share. Since then the shares have been run up to 1*l.* 15*s.*, a sign of the spirit of speculation prevailing here just now.

Shipping statistics.

The accompanying table shows the movement of shipping in this port last year.

There was an increase in the number of vessels of 2,603 over the previous year, representing 3,159,685 tons.

The total of British steamers rose from 3,502 to 5,247, bringing the percentage of British shipping up from 51·21 per cent. in 1892 to 58·78 per cent. last year.

This increase is due to the revival of the Russian grain trade the collapse of which in 1891 brought about an immediate and striking diminution in the amount of shipping passing through here. It must not be supposed that the amount of shipping is any indication of the trade of this port; as all vessels passing through the Straits, to and from Black Sea ports, pay the Turkish dues, and are included in the table, although many of them pass through the Straits in quarantine without touching at Constantinople.

Every vessel which passes through to the Black Sea is counted twice in the table, as will be clear from an examination of it:—

RETURN of all Shipping Entered and Cleared at the Port of Constantinople in the Year 1893.

Nationality.	Arrived from and Cleared for Black Sea.		Arrived from Mediterranean and Cleared for Black Sea.		Arrived from and Cleared for Mediterranean.		Arrived from Black Sea and Cleared for Mediterranean.		Total.		Proportion of Tonnage per Cent.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
British—											
Sail	...	...	1	331	15	250	1	331	17	912	0·01
Steam	1	500	2,584	3,377,038	79	84,930	2,583	3,378,428	5,247	6,840,896	58·77
Ottoman—											
Sail	1,846	167,546	227	39,181	486	23,671	212	35,296	2,771	265,694	2·28
Steam	89	35,243	27	29,557	20	14,173	25	27,418	161	106,391	0·92
Other flags—											
Sail	90	26,379	632	200,496	275	18,475	660	208,969	1,657	454,319	3·92
Steam	44	13,287	907	1,017,129	123	57,351	909	1,018,463	1,983	2,106,230	18·12
Turkish and foreign mail steamship companies	294	241,056	425	554,650	391	334,574	411	548,610	1,521	1,678,890	14·37
Coasting trade—											
Turkish	...	...	...	...	...	...	...	...	3,837	142,976	1·61
British	...	...	...	...	...	...	...	...	83	4,404	
Other flags	...	...	...	...	...	...	...	...	599	38,023	
Total	...	...	...	...	...	...	...	...	17,876	11,638,735	100·00

Gallipoli.

The Vice-Consul at Gallipoli reports a very bad wheat harvest in his district last year.

Canary seed. The only article exported in any quantity was canary seed, which was sold at the commencement of the season at 1*l.* 10*s.* the quarter, free on board in sacks, and ran up, owing to the strong demand, to 2*l.* 2*s.*

The farmers have been sowing canary seed (alpiste) in preference to wheat, and this year's harvest should be double that of last year, when 18,500 quarters were exported.

The wine trade has been in complete stagnation for the last 2 years, the best wines being offered at the miserable price of 1*d.* per oke.* If no improvement takes place, wine-growing will be abandoned in the district.

A new article of export is sardines in oil, which are prepared in a factory newly established.

The bad harvest last year made it necessary to import a small quantity of corn and flour. The suppression, by Imperial Iradé last year, of the internal duty on these articles, when transported by sea from one province of the Empire to another naturally facilitates such importation.

An increase is remarked in the importation of German and Austrian goods, due to the efforts of German commercial travellers who have been working the district during the last 2 or 3 years.

Dédéagatch.

The Vice-Consul at Dédéagatch reports a decrease in the value of the exportations from his port last year of 305,500*l.* as compared with 1892, due to the inferiority of the harvest and the fall in prices.

Since the opening of the Anatolian Railway, the capital is supplied with hard wheat from Asia Minor; and Bulgaria will have to find another market for the 80,000 tons it used to send down.

Imports have increased from 302,000*l.* in 1892 to 401,000*l.* last year, consequent on the reduction of freights on the railway.

English coal was imported last year for the first time to the amount of 3,000 tons. Wood for fuel is becoming scarcer every day; and the Vice-Consul suggests that it might be worth while establishing a coal store at Dédéagatch.

Last year the construction of the Dédéagatch-Salonica Railway was commenced. The contractors are the Vitalis Construction Company, of Paris. The material is being supplied from Belgium and Germany. The Vice-Consul draws attention to the advantages which would result from the construction of a port at Dédéagatch, affording an alternative route for passenger traffic to Europe by Orient express from Adrianople.

* 1 oke = 2¾ lbs.

SCUTARI.

Mr. Vice-Consul Lamb reports as follows :—

I subjoin the usual tabular statements of the imports and exports of this district for the year 1893, which call for no special remarks. They show, indeed, a certain increase over the figures of the previous year, amounting to about 18,000*l.* for the imports and 4,000*l.* for the exports, but this improvement does not appear to possess any particular significance.

Table A.—IMPORTS.

Articles.		Quantity.	Value.
			£
Colonial produce, foodstuffs, &c.	Quintals ..	13,973	32,990
Beer, wine, vinegar, and spirits..	,, ..	753	2,065
Petroleum	,, ..	1,821	1,456
Textile manufactures	,, ..	2,852	45,047
Metals and hardware	,, ..	2,130	6,830
Timber and articles of wood	,, ..	128	2,827
	Number ..	36,469	
Drugs and dyes	Quintals ..	438	2,195
Soap, candles, and matches ..	,, ..	960	3,335
Glass and earthenware ..	,, ..	324	3,340
Paper	,, ..	500	1,873
Leather, hides, &c.	,, ..	600	13,720
Military effects and miscellaneous articles .. .	,, ..	3,208	24,744
Total ..	Number ..	36,469	140,422
	Quintals ..	27,687	

Table B.—EXPORTS.

Articles.	Quantity.	Value.
	Quintals.	£
Wool and hair	1,212	11,535
Hides and skins	1,585	10,967
Sumach	11,173	6,703
Maize	11,163	3,350
Other cereals	3,885	1,972
Miscellaneous	4,702	2,703
Total	33,720	37,230

The present character of the trade of Scutari has been sufficiently commented upon in previous reports, and there is no new feature to call attention to.

Navigation.

The navigation tables show a still further increase of the Austrian ascendancy, more than 83 per cent. of the entire inward and outward trade having been carried in Austrian bottoms, as against 76 per cent. in 1892. The whole of this increase goes to the credit of the Ragusan Company, serving the river port of Obotti, which in the course of the year placed a second and somewhat larger vessel, the "Albania," upon this line. This company now (April, 1894) intends to organise a more regular fortnightly service, calling also at Antivari, Dulcigno, Durazzo, and some of the Dalmatian ports, assuming, in fact, the service established last year, but now again abandoned, by the Ungaro-Croata Company of Fiume, whose steamers called for some months at the Albanian and Montenegrin ports, without doing any appreciable amount of business.

The Austrian-Lloyd now maintains a weekly direct service between Trieste and Medua, which is taken by the steamers of its Thessalian and Cretan (Greco-Orientale) lines alternately. This, however, serves principally for the conveyance of the post, the Lloyd steamers now carrying very little in the way of merchandise to or from Trieste, though the Thessalian liner on its return journeys occasionally brings considerable cargoes of flour from the Salonica mills on Government account.

In last year's report I mentioned that the Italian Steam Navigation Company's "Puglia" had been subsidised by its Government to visit the Albanian ports. The execution of this project was delayed until the mouth of November last, when a fortnightly service was inaugurated between Brindisi, Vallona, Durazzo, Medua, and Antivari. The four or five voyages effected in November and December were practically void of result so far as concerns Medua, and I fear the venture is destined to failure. It might perhaps be of some interest as offering, in connection with the weekly steamers of the P. and O., a more direct and rapid communication with England than any hitherto existing. The demand for this, however, has yet to be created. I am informed that the company, with a view to diminishing expenditure from which it anticipates no adequate return, contemplates the acquisition of a smaller vessel than any of those composing its present fleet, which will be employed exclusively upon the Albanian line.

Public Works.

In the course of last summer some French engineers connected with the Société des Quais de Constantinople visited Scutari, and under their supervision some elementary measures were taken by means of fascines and willow saplings to protect the Medua road from further absorption by the River Drin. These measures fortunately proved effectual during the past winter, for though the road was twice submerged, communication with the sea was never entirely suspended, and the river has not further shifted its bed.

This is, however, the only fact to be recorded in the department of public works. The proposed extension of the Salonica-Monastir railroad to the Adriatic has been for the moment abandoned, though I regard the revival of this scheme in some form or other as ultimately inevitable. The Italian engineers, however, who last autumn surveyed the country traversed by the proposed line reported unfavourably. The expense of constructing the line would be more than double that of the Salonica-Monastir section, amounting, according to their estimates, to 250,000 fr. per kilom. instead of 113,000 fr., and necessitating the increase of the kilometric guarantee demanded from the Government from 14,500 fr. to 30,000 fr. Railways projected.

The Medua-Ferezovitch railway scheme is still in suspense. The official newspaper of the vilayet recently announced that the proposals of Mr. Wm. Leatham Bright had been examined by the Technical Commission of the Ministry of Public Works, which had presented a report thereon to the Council of Ministers approving them in every point, except in so far as concerns the amount of the kilometric guarantee. Mr. Bright, it appears, had asked for 10,000 fr., whereas the commission calculated that the revenues of the proposed line, during at least the first 10 years of its existence, could not exceed 7,000 fr. per kilom. and the Government would accordingly be called upon to provide an annual sum of nearly 40,000*T*. to cover the deficit. Considering the large amount of provincial revenue that the Ottoman Government has already pledged under the form of railway guarantees, the desire of the Ministry of Public Works to get at least one line constructed at the builders' risk is not unnatural. The risk in this instance, however, appears considerable. The construction of the line from Medua to Ferezovitch would involve, according to the only available estimate, which is probably below the mark, an outlay of nearly 1,250,000*l.* and a revenue of 7,000 fr. per kilom., supposing the estimate of the Technical Commission to be realised, would yield a gross return (*i.e.* before deducting anything for working expenses) of less than 6 per cent. upon this capital.

A French syndicate is likewise reported to be seeking to obtain the concession for this line, but upon a different basis, demanding in lieu of the customary kilometric guarantee a cession of the principal forests in the districts traversed. Nothing definite, however, is known here as to this proposal.

In all the numerous schemes which are continually being projected and discussed, though seldom destined to pass beyond the stage of discussion, for the development of this country, whether it be for carriage roads, for railways, for harbour construction, for river regulation or what not, the main resource indicated alike by the Government and the population as ultimately destined to give returns for expenditure has always been "the forests." It may, therefore, be not without interest to consider of what these much talked of forests consist and what possibilities there may be of deriving profit from them. Forests.

The physical configuration of the Scutari Vilayet, a region of

steep and lofty mountains merely separated from the Adriatic by a narrow alluvial belt, naturally causes the woods of this district to fall into two easily distinguishable classes, those of the highlands and those of the coast. Various considerations, political as well as physical, have hitherto prevented the exploitation of the former, which while intrinsically the more valuable are necessarily the more difficult of access, from being taken into serious consideration, but for the past 10 years or more the Government has been tentatively seeking to turn the latter to account. Inspectors of Woods and Forests were appointed both here and at Durazzo, and attempts made, first to prohibit and then to regulate their promiscuous devastation by the neighbouring populations, while European capitalists were invited to tender for their systematic exploitation. It appears, however, that from the marshy nature of the ground on which they stand, intersected as it is by numerous streams, lagoons, and swamps, and liable to annual inundation, the great majority of their trees are not convertible into high-class timber, and this fact, combined with the somewhat exaggerated pretensions of the Government, has hitherto discouraged such Europeans as have responded to its invitation from facing the various difficulties and risks connected with all enterprises of such a nature in a country so unsettled as Albania. The only exception with which I am acquainted resulted in disastrous failure.

The " Orman Daïresi " claims to have established its control over 11 separate forests or groups of woods, the greater part of which are situated in the Kazas of Kroya and Shiak, the former belonging to the Scutari and the latter to the Durazzo Sandjak.

The immediate neighbourhood of Scutari, and indeed the whole of the central Kaza, though not yet absolutely denuded, has long ceased to contain anything meriting the title of forest. The foot-hills to the east of Scutari and the woods of Velipoia, at the mouth of the Boyana River, continue to supply the city with charcoal and firewood sufficient for its requirements; but the latter are of small extent, and in the former the zone of desolation is rapidly advancing. The trees being felled, the undergrowth is abandoned to the tender mercies of a numerous class of refugees and other poor folk who supply fuel to the bake-houses and brick-kilns of the city. Every year they go farther afield and not a stick is left standing behind them, the roots even being frequently torn from the ground, till nothing but bare rock remains.

The northern Kaza of Tousi likewise possesses nothing but a few remaining patches of scrub-oak.

In the Kaza of Alessio commences the long stretch of forest, swamp, and jungle, which under various names extends from the left bank of the Drin to the River of Ishm, covering a length of 18 miles, with an average breadth of 5 miles.

That part of it lying between the River Drin and River Mat, and belonging to the Alessio Kaza, is known as the Pütha Bardaloïea. Much of this is hopeless jungle or tamarisk swamp, while all the better woods are rapidly disappearing under the axes of the Skrelli and Klementi mountaineers, who have their winter

quarters in this district, and are bringing all the drier portions under cultivation. Their object is a reasonable one, but their methods are wasteful in the extreme, fire being freely resorted to. A certain amount of wood, however, is exported hence for fuel, being supplied by them at the water's edge at rates varying from 20 paras to 60 paras (1*d.* to 3*d.*) per horse-load.

South of the Mat the forest continues for a distance of 4 hours' journey, occasionally interrupted by clearings or by small swamps and lagoons, and covers practically the whole of the low ground between the Scutari-Tirana main road and the seashore. It falls into four sections, known respectively as Gurs, Boshnesh, Tomana, and Shperdeti, all of which fall within the Kaza of Kroya. The three first-named occupy the lowest portion of the ground along the coast. They follow each other in the order named from north to south, being separated by the streams or creeks known as Minegül and Shlins. These forests are principally composed of elm, ash, and beech, but in the swampier portions willows of several species and other trees are met with, and there is also a considerable undergrowth of cornel cherry, crab-apple, hawthorn, maple, and (near the sea) tamarisk and other shrubs. They cover an area of more than 21,000 acres, exclusive of clearings and cultivated ground.

The Shperdeti forest occupies the slightly higher ground lying between the other three and the Kroya foot-hills, and covers an area of nearly 6,000 acres. Here the oak predominates, and trees of considerable dimensions are plentiful. The Inspector of Forests estimates them to range from 10 metres to 13 metres (*i.e.*, 32 feet to 42 feet) in height, with a circumference of $1\frac{1}{2}$ metres to 2 metres. The foot-hills themselves are mainly clothed with oak-woods, which, however, being freely resorted to by the inhabitants of the villages lying along their base, are reduced to the condition of "baltalik," or scrub.

Behind these again, and adjoining the villages of Shkuraj and Malj Barth, is another forest of some 4,500 acres, which, together with that of Shperdeti, may really possess some commercial value. It consists mainly of oaks, ranging from 10 metres to 15 metres in height, which the Mat and its tributary, the Urlaz, would afford a means of transporting to the sea.

The Durazzo Sandjak, excluding the plains of Tirana and Kavaya, is occupied by a network of low hills, which have no apparent geological connection with the mass of mountains to the east of them, and were probably at no distant period entirely forest-clad. Much wood, indeed, still exists on them, but all that had any value as timber has now been felled, and the rest is rapidly decreasing, as an active exportation of firewood and charcoal is conducted from this district.

As may be seen, therefore, from the subjoined tabular statement, the total area of the wood-lands under the supervision of the Forest Department of this vilayet amounts to nearly 70,000 acres, of which some 25,000 acres may be regarded as consisting of more or less marketable timber.

LIST of Forests under the Administration of the Orman Daïresi of the Vilayet of Scutari.

Name of Forest.	Kaza in which Situated.	Extent in Acres.	Principal Species of Trees Composing it.	Remarks.
1. Velipoja and Loarsi	Scutari	1,730	Elm, ash, and oak	Mostly young growth, of medium dimensions
2. Pütha Barthaloïes	Alessio	6,060	Elm, ash, poplar, some oak, beech, cornel, tamarisk	Mostly small wood, attaining at most 1 metre in girth
3. Gura	Kroya	14,800	Elm, ash, beech, oak	Ranging from 8 metres to 13 metres in height and 1·80 metres to 2 metres in girth. The character of the wood improves in proportion to its distance from the sea
4. Boshnesh	„	4,900		
5. Tomana	„	1,730		
6. Shperdeti	„	5,930	Mostly oak	Good timber, ranging from 9 metres to 15 metres, with a girth of 1·20 metres to 2 metres
7. Malj, Barth, and Shkuraj ..	„	4,450	Oak and birch	
8. Muzhlu, Dratch, Lala ..	Shiak	14,800	Oak	Mostly scrub or young growths, good only for firewood and charcoal.
9. Hamale and Rushkuli ..	„	2,960	Oak, beech, ash, elm, and willow	
10. Sakth and Buba	Durazzo	7,400	Oak	Medium growth, attaining a maximum height of 10 metres
11. Isaka	Durazzo and Kavaya ..	4,940	Scrub and brushwood	Of no commercial value
Total area of 11 groups..	..	69,700	..	..

The forests of the highlands have not yet been brought within the purview of the Orman Daïresi, and it is impossible to give even an approximate estimate of their area. The districts lying east of Scutari contain a considerable number of pine, fir, and beech woods, the latter frequently attaining magnificent proportions, but they are generally found in practically inaccessible situations. The same may be said for the mountains east of Kroya. The Mat Kaza and the lower portions of Mirdita are thickly covered with oak woods, which might, perhaps, be exploited by means of the River Mat and its tributaries, but they are mostly of small or medium growth, being freely cut for the preparation of charcoal. The finest timber of all is encountered in the higher mountains of Mirdita, where there are some really splendid forests of pine and fir, but there again, excepting perhaps in the case of a few which clothe the slopes overhanging the Fandi River, the difficulties of transport are such as, in my opinion, to render their successful exploitation impossible, even if the country should eventually be traversed by a line of rails. In the latter case, however, these forests would acquire a real importance from the point of view of the constructing company, which would be saved from the obligation of importing timber.

Movement of the Ports of Medua and Obotti during the Year 1892.

Entered.

Nationality.	Steam.		Sailing.		Total.		Value of Cargoes.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
							£
Austrian ...	238	147,496	...	...	238	147,496	121,420
Ottoman... ...	6	3,153	150	9,188	156	12,341	14,282
Montenegrin ...	...	...	13	327	13	327	4,440
Italian	6	4,496	1	10	7	4,506	...
Greek	...	...	3	154	3	154	280
Total	250	155,145	167	9,679	417	164,824	140,422

Cleared.

Nationality.	Steam.		Sailing.		Total.		Value of Cargoes.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
							£
Austrian ...	238	147,496	1	7	239	147,503	26,995
Ottoman... ...	6	3,153	164	9,441	170	12,594	8,221
Montenegrin ...	...	...	14	350	14	350	1,680
Italian	6	4,496	2	34	8	4,530	226
Greek	...	...	5	182	5	182	108
Total	250	155,145	186	10,014	436	165,159	37,230

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No. 1403.

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TURKEY.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF ALEPPO.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1200.

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1389.	Panama	1½d.
1390.	New Orleans	2½d.
1391.	Manila	2d.
1392.	Foochow	1d.
1393.	Ningpo	1d.
1394.	Chinkiang	1d.
1395.	Tamsui	1d.
1396.	Chungking	1½d.
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TURKEY.

ALEPPO.

Consul Jago to the Earl of Kimberley.

My Lord, *Aleppo, April* 30, 1894.

I HAVE the honour to transmit herewith to your Lordship my Trade Report for the year 1893, together with that of Mr. Vice-Consul Dillon on the Trade of the Province of Adana for the same period.

The Returns of Trade at Alexandretta, the port of the city and province of Aleppo, have been compiled by Mr. Vice-Consul Catoni.

I have, &c.
(Signed) THOS. S. JAGO.

Report on the Trade and Commerce of the Consular District of Aleppo for the Year 1893.

ABSTRACT of Contents.

	PAGE
Aleppo—	
Exportation	2
Importation	2
Shipping and navigation	3
Public works, mines, railways, &c.	3
Tables of shipping, exports, and imports	7
Adana—	
Introductory remarks..	10
Exports	10
Imports	11
Remarks on commercial travellers	12
Tables of exports, imports, and shipping	13, 14

Exports.

Compared with 1892, exports show a falling-off of 7,162 tons in weight, but an increase in value of 66,775*l.*, the latter due, however, to the large exportation of specie consequent on the high rate of exchange at Aleppo, and which amounted to the large sum of 198,459*l.*

Cereals. Year by year the trade of the province of Aleppo seems to diminish, and the stagnation of business to increase. Wheat and barley, the mainstays of the country, were exported in insignificant quantities owing to the competition in Europe of American, Indian, and Russian cereals, handicapped as they are by heavy transport charges on camel-back from the interior. The total quantity exported in 1893 was limited to 2,000 tons of oats, the produce of the coast line, a demand for which exists in the south of France, whilst in 1891, 19,000 tons of cereals were exported, and in 1892, only 7,000 tons.

Wool. The export of wool shows a falling-off of 788 tons, representing 26,382*l.*

Liquorice-root. The export of liquorice root, all of which goes to the States, has diminished, although the quantity gathered has this year largely increased, but, owing to the crisis, shipments have been delayed.

Native manufactures, oil-seeds, soap, raisins, and butter. All of these articles show a decrease in exportation.

Silk cocoons. Among the few articles, the export of which has increased, are cocoons, which show an increased value of 7,432*l.* over last year, and an increased weight of 15 tons. This article purchased at the time of production at very good prices, left an appreciable gain to the producer, but proved most prejudicial to the merchants, as prices fell from 16½ fr. to 17 fr. per kilo. in May and June, to the low price of 9 fr. to 9½ fr. in December.

Imports.

English manufactures. The falling-off in imports affects chiefly English manufactures, silks, ironware, indigo, petroleum, and many other articles too numerous to mention, showing a decline in the purchasing power of the people. A few articles such as cloth, sugar, coffee, rice, spirits, &c., show, however, a marked increase produced by the ever-increasing wants of the consumer of the interior, but here, again, the import of specie has much to do with the total aggregate increase of imports as shown by the returns.

British exports. As regards trade with different countries, the returns show, as regards England, an increased export of 5,242*l.*, largely accounted for by 3,400*l.* sent in gold.

British imports. British imports, however, fell off to the value of 154,733*l.*

France. Exports to France show an increase in silk cocoons, wool, galls, olive oil, and Morocco leather, and, as regards imports, an increase is apparent in coffee, leather, and especially specie.

Trade with Germany increases yearly. Exports show an appreciable increment, but as regards imports it is difficult to decide between Germany and Austria, both using Trieste largely as the port of shipment. Germany.

Imports slightly increase chiefly from the port of Antwerp. Belgium.

Shipping.

Shipping shows an increase of 30 vessels, and of 21,710 tons register, owing to British shipping and the creation of a new line of Austrian Lloyds' steamers to Beyrout and Constantinople.

Sailing ships, owing to little export of grain and liquorice root, diminished by 22 ships and 7,024 tons register.

British shipping shows an increase of 8 steamers and of 9,804 tons register. Bell's Asia Minor Company's steamers still run on the Egyptian and Syrian lines, Papayanni's Liverpool line less frequently. On the other hand, Knott's Prince line, of Newcastle-on-Tyne, have during the year under review established services between London, Liverpool, Antwerp, Hamburg, and the Syrian coast which promise to do well. British steamship communication.

British steamers brought goods to the value of 850,726*l.*, and carried away to the value of 144,583*l.*, against 961,017*l.* and 128,158*l.* respectively in 1892.

Public Works, Mines, Roads, and Railways.

The export of copper from the Argana Mine was limited this year owing to transport difficulties. Copper ore.

The soundings by European engineers of the petroleum springs near Alexandretta are still being actively pursued, but, so far, have not been crowned with success. Petroleum springs.

As regards public roads one has been begun from Aleppo to Birigek on the Euphrates, a distance of 137 kiloms., of which 20 kiloms. have been finished. Permission has also been granted by the Government to convert the present camel road from Aleppo to Afseen into a carriage road, by which a distance of 37 kiloms. will be saved between Aleppo and Alexandretta as compared with the present carriage road. Under the auspices of the present Governor-General, the old Kittab Bridge leading into Aleppo has been replaced by a wide and handsome structure. The old ditch between Aleppo and the populous suburb of Jedeidah has been filled up, a commodious road built, upon which houses are being erected. In the city the public gates are being widened, and incommodious corners being lopped off. A tramway also is in contemplation. Roads. Bridge. Tramway

Although the imports and exports of Aleppo have averaged during the last 10 years close upon 2,500,000*l.*, little banking facilities other than those offered by the native Saraffs have existed. In May, 1893, the Imperial Ottoman Bank opened a Banks.

branch here, and so far the staff has, with difficulty, been able to cope with the business attracted to it.

Railways.

The hopes raised that the recent granting by the Ottoman Government of concessions of Railways in Asia Minor, Syria, and Palestine, would be found to include a short line from Aleppo to the sea at Alexandretta, the natural port of Aleppo, a distance of 100 miles by the carriage road and 75 miles by the ordinary camel and mule road, thus permitting the development of the province, have been doomed to disappointment.

In June, 1893, a concession was, however, granted by the Porte to Mr. Motran, a native gentleman, acting for a group of French capitalists, for a line of normal gauge from Damascus to Biredjik on the Euphrates, a distance of about 350 miles, with power of extension to Telek, near Diarbekir, a further distance of 150 miles. This group has since amalgamated with the French Company now building the port of Beyrout and the steam tramway from Beyrout to Damascus, a distance of about 92 miles, and the Belgian steam tramway from Damascus to the plains of the Hauran, forming altogether what is called the Compagnie des Chemins de Fer Économique de Beyrouth-Damas-Hauran en Syrie.

The line from Damascus to Biredjik enjoys a government kilometric guarantee of 12,500 fr., and according to the prospectus would be 489 kiloms. in length, or say 306 miles, as follows:—

From—	To—	Number of Miles.
Biredjik	Aleppo	94
Aleppo	Hamak	93
Hamak	Homs	31
Homs	Baalbec	61
Baalbec	Junction with the steam tramway between Beyrout and Damascus ..	22
Total	.. ..	306

This would give the railway distance, with break of gauge, from Biredjik to Beyrout, as 344 miles, or from Aleppo as 250 miles.

The military authorities, however, it is said, view with disfavour this proposed deviation from the direct route from Aleppo to Damascus, with the disadvantage of break of gauge, and prefer the line being carried direct from Homs to Damascus, which, however, would lengthen the total railway distance from Aleppo to Beyrout by about 44 miles, making nearly 360 miles from Aleppo to Beyrout, or from Biredjik to Beyrout about 440 miles. As regards the proposed railway rates, the Cahier de Charges fixes the minimum charge of 15 c. per ton of 1,000 kilos., or say 4 cantars of 200 okes each per kilom., thus making the lowest cost of transport from Biredjik to Beyrout of a ton of merchandise by the company's proposed route to be 3*l.* 6*s.*, and from Aleppo to Beyrout 2*l.* 8*s.*,

while by the direct route viâ Damascus insisted upon by the authorities it will be 4*l.* 5*s.* and 3*l.* 6*s.* 9*d.* respectively. This is irrespective of extra charges such as carriage from the merchant's warehouse at Biredjik or Aleppo to the railway stations at those places; carriage at Beyrout to the quay; and, lastly, the new port and quay dues at Beyrout, which are very heavy indeed.

Against these prospective charges for produce by railway transit, we have the far cheaper and economical charges now existing by camel and mule direct to Alexandretta, averaging from Biredjik 2*l.* 6*s.*, and from Aleppo 1*l.* 10*s.* per ton. It is true that these rates were subject to violent fluctuations, and that the average rate from Aleppo has been computed by a high authority at 5*s.* per ton higher. At the present time (March) heavy produce is being carried by camel from the warehouses at Aleppo to the customs-house quay at Alexandretta, where no port or quay dues are leviable, at 15*s.* per ton, a distance only of 75 miles; and even at this low rate exports of cereals are not possible in view of the low prices obtaining in Europe. Thus, while produce, chiefly grain, the principal resource of the country, rots for want of some cheap means of communication with the sea, it can hardly be expected that the hopes of the company to develop production and attract traffic can be realised by the simple process of doubling or trebling the present cost of transport to the sea.

The same considerations apply, of course, to the produce of Mesopotamia brought for export through Biredjik, and to that of the plains of Hamak and Homs, the natural port of which latter is Tripoli. In all these cases the proposed line cannot compete with the camel, with the result that the development of the province still remains retarded while the Government is saddled with a serious annual charge in the shape of the kilometric guarantee. Indeed, it is calculated that all possible available traffic can at the minimum rate barely reach one-third of such guarantee, as produce, in view of rates which are simply prohibitive, will inevitably prefer the cheaper if not the most expeditious route, namely, by camel and mule to the natural port of the province, viz., Alexandretta. It is true that the company has the preference by its concession to construct branches to the sea, but, unfortunately, if such privilege were taken advantage of it would prove a serious detriment to the main line, and reduce its already small earnings to nil.

Such short lines, however, if working independently, would compete most successfully with the camel, and do wonders for the country. They are as follows:—

From—	To—	Number of Miles.
Biredjik	Aleppo	94
Aleppo	Alexandretta	75
Hamak	Homs	31
Homs	Tripoli	60½

Telegraphs.

A new line is now being laid between Aleppo and Zor (Deir) on the Euphrates, viâ the towns of Bab, Moombudge, Meskéné, and Rukka.

Annex A.—Return of Shipping at the Port of Alexandretta during the Year 1893.

Nationality.	Steam.			Sailing.			Total.		
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.
England	80	50,904	1,619	..	..	..	80	50,904	1,619
France	62	104,656	4,303	..	..	..	62	104,656	4,303
Italy	11	5,708	218	9	6,137	121	20	11,845	339
Austria	59	67,324	2,756	1	1,111	35	60	68,435	2,791
Turkey	97	74,962	3,393	341	3,449	1,313	438	78,411	4,706
Egypt	51	41,300	2,493	..	..	..	51	41,300	2,493
Greece	..	..	..	7	2,044	52	7	2,044	52
Sweden and Norway	3	1,321	44	..	.	..	3	1,321	44
Samos	..	..	..	2	282	13	2	282	13
Total	363	346,175	14,826	360	13,023	1,534	723	359,198	16,360
„ for the year preceding	333	319,465	13,497	382	20,047	2,150	715	339,512	15,647

Note.—The above return comprises ships entered only.

Annex B.—Return of Principal Articles of Export from Alexandretta during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Native manufactures ..	353	135,141	265	138,210
Silk cocoons	46	22,822	31	17,400
Cotton	42	1,284	43	1,376
Wool	2,366	117,572	3,118	143,264
Galls and yellow berries	656	31,289	567	23,685
Yellow wax	35	4,210	30	3,600
Gum	173	11,473	34	2,382
Sesame, poppy, and castor-oil seeds ..	668	6,427	908	10,175
Wheat, barley, dari, &c.	2,394	10,457	7,113	30,954
Soap	136	4,236	347	10,802
Tobacco	104	8,305	46	2,544
Pistachio nuts	146	11,971	86	6,870
Raisins and figs ..	275	1,859	428	2,852
Almonds and apricots, kernels	73	1,927	169	4,385
Butter and oil	2,040	105,400	1,846	104,758
Provisions	130	5,973	244	6,201
Morocco leather and hides	604	49,735	472	41,275
Goat's hair (tiftik) ..	12	708	14	1,120
Firewood	815	815	1,221	1,221
Opium	7	5,607	4	3,200
Scammony root ..	83	2,975	81	1,000
Liquorice root	5,008	35,179	6,145	47,250
Valonea	212	1,574	178	1,068
Salt guts	42	12,247	30	7,200
Lentils and peas ..	416	2,496	617	5,702
Albumen and yellow of eggs	53	2,966	70	3,500
Copper ore	576	23,112	543	20,091
Oranges and lemons ..	622	6,110	751	9,765
Sundries	304	12,425	161	6,442
Cattle	..	10,681	..	85,786
Specie	..	138,459	..	114,000
Totals	18,415	932,991	25,577	866,256

Annex C.—RETURN of Principal Articles of Import to Alexandretta during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Manufactured goods ..	6,233	1,075,491	6,493	1,187,940
Cloth	244	128,265	182	91,250
Silk	19	28,800	17	25,600
Silk manufactures ..	22	60,881	27	73,980
Sugar	1,935	38,707	1,341	26,820
Coffee	215	21,220	160	16,000
Rice	481	5,025	320	3,358
Cochineal	16	1,920	29	3,480
Wine and spirits ..	302	13,546	211	6,526
Leather and hides ..	413	42,782	313	28,900
Pepper and pimento ..	96	3,784	77	3,234
Provisions	309	6,428	265	6,064
Paper and stationery ..	199	8,597	318	13,750
Copper	261	19,770	243	18,345
Lead, zinc, tin, and steel	305	11,717	284	11,061
Iron and ironware ..	1,100	22,047	1,256	25,787
Indigo	98	58,800	107	64,200
Petroleum	2,107	9,500	5,607	28,235
Glass and crystal ..	490	9,176	410	6,719
Drugs	523	25,782	475	21,940
Tobacco and tombaki ..	124	19,840	96	15,360
Sundries and hardware	1,311	77,450	896	66,701
Coal	610	630	..	..
Colour	188	12,277	185	13,660
Specie and jewellery ..	..	180,635	..	41,920
Total	17,601	1,883,070	19,312	1,800,830

TABLE showing Total Value of all Articles Exported from, and Imported to, Alexandretta, from and to Foreign Countries, during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
England	73,075	67,833	913,302	1,068,045
France	137,666	122,860	182,458	116,643
Italy	27,513	63,288	14,924	11,244
Austria	18,287	13,575	244,212	202,825
America	45,094	64,409	..	.
Belgium	..	..	42,855	33,658
Germany	21,175	12,492	..	..
Greece	437	2,781	..	..
Turkey	421,526	342,289	395,609	267,243
Egypt	188,218	176,689	78,135	72,392
Russia	..	..	11,575	28,780
Total	932,991	866,216	1,883,070	1,800,830

ADANA.

Mr. Vice-Consul Dillon reports as follows:—

Introductory Remarks.

Although the harvests were all round a success, the consequent benefit to the country was largely diminished by the establishment of quarantine in Europe against Turkey, and which prevented shipments at the opportune moment.

Exports.

The annexed Table A shows the export trade of the Vilayet. During the year 1893 produce was exported to the value of 561,710*l.* as against 1,062,200*l.* in 1892, a decrease of 500,490*l.* The ports of exportation were as follows:—

From—	Value.
	£
Mersina	511,710
Smaller ports of the Vilayet	50,000
Total	561,710

Cereals.

The wheat harvest was large, but quality inferior, and in consequence of low prices in Europe the bulk remains in stock in hopes of better prices. Purchases were made by the tithe-farmers on the ground at 26*s.* 8*d.* per quarter, and afterwards offered at Mersina at 20*s.* per quarter, causing thus a serious loss.

Adding to this loss of 6*s.* 8*d.* per quarter the cost of transport to Mersina by rail or cart, plus the loss in weight, it is not surprising that a dead-lock has taken place, the more so as speculators advanced as much as 70 per cent. on the original price of 26*s.* 8*d.*

Oats, barley, and sesame-seed.

The crops of these products were good, and the whole quantity exported.

Cotton.

This crop was good, but prices ruling low in Marseilles and Trieste, where large stocks are held, little was exported, and holders prefer to retain in hopes of higher prices.

Raisins.

The tax of 10 fr. imposed by France has had for result a large falling-off in the exportation of this article, which principally went to that country. The gain, however, to France is largely neutralised by the largely-increased consumption in this province of raisins in lieu of French imports of sugar, spirits and wine.

Trade with England.

Trade with Great Britain may be taken as follows:—

Articles.	Value.
	£
Wool	3,000
Cereals	18,000
Cotton	8,000
Cotton-seed..	22,000
Sundries	2,000
Total	53,000

as against 69,300*l.* in 1892, or a decrease of 16,300*l.*

The export trade with other countries was as follows:— Export trade with other countries.

To—	Value.
	£
France	182,600
Turkey (Smyrna and Constantinople) ..	170,000
Austria-Hungary	75,600
Italy	16,000
Spain	12,000
Egypt	45,000
Other countries, Cyprus, and other Isles..	7,510
Total	508,710

as against 992,900*l.* in 1892.

Imports.

The annexed Table B shows the imports at Mersina as 608,360*l.* as compared with 591,180*l.* in 1892, or an improvement of 17,180*l.* caused by English trade.

Coal and machinery are imported direct to Mersina. Other merchandise after manipulation at Smyrna, Beyrout, and Alexandretta. A direct line of English steamers, however, the Knott's Prince Line, with a bi-monthly service running hence to Mediterranean ports and England, will no doubt benefit our trade by permitting shipments without the risk and damage from transhipment. Trade with England.

As regards imports the bulk in 1893 came from England as follows:— Importance of imports from England.

Articles	Value.
	£
Manchester goods	55,000
Sacks and sacking from Scotland	23,000
Woollen stuffs	20,000
Machinery	6,000
Bar iron and plate	6,000
Colonials	12,000
Copper and tin	20,000
Leather belting for thrashers, &c.	3,000
Drugs and spices	8,000
Earthenware	3,000
Coal	4,000
Total	160,000

Imports from other countries.

The value of goods imported from other countries is :—

From—	Value.
	£
Turkey	242,000
Austria-Hungary	105,000
France..	58,000
Russia	8,000
Belgium	25,000
Sundries	2,360
Total	448,360

Deducting, however, the value of Turkish imports into Mersina, viz., 242,000*l.*, and on which Turkey levies duty, we have the total value of imports from all foreign countries save England as 206,360*l.*, thus making English imports 78 per cent. of the total of such imports.

Commercial travellers.

I would venture to express the opinion that should the United Chambers of Commerce in Great Britain collectively subscribe for sending pushing commercial travellers English trade would be forced and income would accrue.

After several years' residence in the country I have been obliged by force of circumstances, and much against my will, to acquire foreign tastes.

If I wish for boots I must have them from France, or if ale is required it is obtainable from Germany, or, perhaps, better from Belgium. The ale from Strasbourg, I believe, comes nearly every day to Turkey. This state of affairs could and should be remedied by what I have before said regarding commercial travellers. We are slowly losing our trade, and Englishmen are acquiring quickly, but very surely, what is brought them by foreign commercial travellers. Speaking of English pushing commercial travellers, I would venture to say such travellers should know English only, for natives have confidence in the word of an Englishman.

The extension given by the Imperial Ottoman Bank into remote parts of the Empire seems to me to guarantee travellers against loss, as since the advent of the present Director-General there are employés in every district who know English and would guide Englishmen.

It is distressing to see the want of foresight on the part of English merchants. Sitting in my office, I have not a single thing English on me save my flesh and bones, and yet the remedy is so easy as aforesaid. For my coal supplies I have to apply to France, the facilities being greater.

Annex A.—RETURN of Principal Articles of Export from the Vilayet of Adana during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Wheat	11,328	50,000	56,000	325,000
Barley	4,850	15,500	9,400	38,100
Oats	8,110	32,500	8,300	31,200
Millet	825	3,300	500	2,500
Rye	..	..	1,600	8,000
Cotton	5,215	166,860	8,500	340,000
„ seed	8,140	24,300	11,400	37,000
„ „	1,775	15,000	..	..
Sesame	5,320	70,200	740	11,840
Wool	820	33,000	758	30,300
Raisins	150	600	231	1,380
Yellow berries	355	2,130	120	3,600
Gum tragacanth ..	200	20,000	163	29,340
Fruits	275	1,080	510	3,000
Skins	240	14,400	310	18,600
Silk cocoons	20	8,000	45	14,200
Beeswax	25	3,000	31	4,000
Cattle	..	5,200	..	3,000
Carpets and rugs ..	50	8,400	62	9,900
Opium	3	4,000	3	4,000
Tar	260	3,080	317	1,030
Wood and timber ..	..	19,000	13,000	35,000
Cotton yarn	331	22,400	440	35,000
Lead	300	2,900	686	6,860
Charcoal	382	600	692	1,000
Valonea	2,000	11,500	3,920	23,150
Other articles	2,373	24,760	7,100	45,200
Total	53,347	561,710	124,828	1,062,200

Annex B.—Return of Principal Articles of Import to Mersina during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Coffee	180	20,000	267	26,700
Sugar	2,000	44,000	2,800	56,000
Rice	849	12,000	1,100	11,000
Rough iron	1,285	16,700	1,500	19,500
Copper sheets and cottons, steel, bar tin	315	36,400	120	7,200
Nails and iron tools ..	385	7,700	400	8,000
Machinery	400	8,000	400	8,000
Manchester goods ..	589	70,700	600	72,000
Jute sacks and sacking	980	25,000	1,100	22,000
Woollen stuffs	400	60,000	300	45,000
Leather	180	28,000	190	22,800
Petroleum	2,061	12,200	2,200	13,200
Spirits and wines ..	599	18,600	733	27,800
Soap	800	3,200	700	28,000
Olive oil	200	7,400	217	8,680
Tobacco	340	97,000	500	110,000
Provisions	180	35,000	337	31,000
Fruits	1,780	18,500	800	9,600
Drugs and chemicals ..	140	2,500	25	3,750
Spices	70	10,500	50	7,500
Glass and earthenware	1,100	11,360	357	10,700
Fancy goods	200	12,000	192	11,500
Coal	4,684	7,000	1,900	2,400
Sundry articles	2,553	42,600	1,214	28,750
Total	22,270	608,360	18,052	591,080

Annex C.—Return of all Shipping at the Port of Mersina during the Year 1893.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	89	49,926	89	49,926
Turkish	728	13,381	85	77,112	813	90,493
Greek	41	9,275	39	13,473	80	22,748
French	...	...	65	106,810	65	106,810
Egyptian ...	...	...	51	51,678	51	51,678
Austro-Hungarian	...	...	52	60,208	52	60,208
Italian	10	4,429	5	3,056	15	7,485
Swedish and Norwegian	...	...	7	3,211	7	3,211
Dutch	11	519	...	...	11	519
Total	790	27,604	393	365,474	1,183	393,078
,, for the year preceding ...	611	26,345	396	431,243	1,007	457,588

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1329	Paramaribo	1½d.	1390.	New Orleans	2½d.
1330	St. Petersburg	2½d.	1391.	Manila	2d.
1331	Patras	1½d.	1392.	Foochow	1d.
1332	Calais	2½d.	1393.	Ningpo	1d.
1333	Luanda	1d.	1394.	Chinkiang	1d.
1334	Bordeaux	2½d.	1395.	Tamsui	1d.
1335	Taganrog	1d.	1396.	Chungking	1½d.
1336	Galveston	8½d.	1397.	Philadelphia	3½d.
1337	Riga	2d.	1398.	Bilbao	2½d.
1338	Batavia	1½d.	1399.	Dunkirk	1d.
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1340	Baltimore	1½d.	1401.	Tainan	1d.
1341	Havre	2½d.	1402.	Ichang	1d.
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1345	Galatz	1½d.	1406.	Wênchow	½d.
1346	Trebizond	1d.	1407.	Pakhoi	1½d.
1347	Algiers	3d.	1408.	Hankow	1d.
1348	Aneypsla	½d.	1409.	Amsterdam	1d.
1349	Cherbourg	1d.	1410.	Copenhagen	½d.

No. 1411.

Reference to previous Report, Annual Series No. 1261.

TURKEY.

DAMASCUS.

Mr. Eyres to the Earl of Kimberley.

My Lord, *Damascus, May* 8, 1894.

I HAVE the honour to transmit herewith my Trade Report for the year 1893.

The delay in forwarding this Report is caused by the fact that I am unable to obtain till the spring the statistics which enable me to judge of the movement of Trade and Commerce during the preceding year.

I have, &c.
(Signed) H. C. A. EYRES.

Report on the Trade and Commerce of Damascus for the Year 1893.

ABSTRACT of Contents.

	PAGE
Prefatory remarks	1
Imports	3
Exports	5
Public works	6
Annexes—	
I.—Imports	8
II.—Exports	8
III.—Imports and exports	9

Trade report, 1893.

Prefatory remarks on the state of trade.

As far as it is possible to judge from the approximate statistics annexed to this Report, 1893 would appear to have been a good year for trade and commerce in Damascus.

Business generally was fairly brisk and there was rather more movement than usual in the markets, owing to the influx of foreigners caused by the construction of the railways to the Hauran and the coast. The needs of Europeans cannot be supplied by local produce, and some considerable portion of the

increase in the imports may be put down to this cause. A steady increase in the bulk of trade, as I have previously reported, may be looked for in the absence of any disaster, climatic or other, as Damascus wares find increased favour with the travelling world and more foreign money is yearly spent in the country, which naturally causes an expansion in the imports; and in addition to this there is, I am convinced, a slow but steady increase in population. In the result, according to the estimate made of the imports and exports, there has been a rise of 10 per cent. in the former and 5 per cent. in the latter, which would be exceedingly satisfactory, were the whole increase due to bonâ fide trade.

Competition has greatly diminished profits;

But this is doubtful. Till within the last few years there existed none of the cut-throat competition which prevails so extensively in Beyrout, and which has made that city a by-word in European markets for its failures. But lately a change has been taking place, and many small houses or moneyless adventurers have started in trade to a far larger extent than is justified by the means of the former or the absence of means of the latter. The result is that in the first place more merchandise is imported than the consumption requires, and in the second place the smaller men are obliged to sell at any price, so that profits are reduced to a minimum, and in some cases goods are actually sold at a loss. Then follow bankruptcies, sometimes forced, sometimes fraudulent, and the eventual loss falls on the European producer.

and has established trade on a less sound basis.

Credit to be granted with care.

It becomes therefore increasingly necessary for the British merchant to be exceedingly careful to whom he allows credit. Were it not useless to argue against the custom of the trade, it would be desirable to recommend that no credit at all should be granted except to old and tried customers. But there is one way out of the difficulty which was in old times adopted and which has been, for no sufficient reason that I am able to perceive, abandoned, and that is to establish British commission agents on the spot. They have the advantage of being residents, and of knowing whom they can trust, and of being able to apply local pressure if a debtor fails to pay. It is objected to this course that the European is undersold by the native because the former's habits were more expensive, and that the plan has been tried and failed. In all cases with which I have been acquainted there have been amply sufficient personal reasons to account for the failure of the agent, and it is impossible to comprehend why German merchants should be able to live, and live well, while British merchants fail, unless it be that the former are more hard-working, painstaking, and let no chance slip. In any case, let British merchants take this warning, that if credit be granted on the present reckless system, it will assuredly not be long before Damascus will have as evil an odour in Manchester as Beyrout and some other ports.

Recommends establishment of commission agencies.

While on this subject I would once more earnestly press on the mercantile world in general the absolute necessity of sending out travelling agents if they desire to keep or enlarge their

market in this part of the world. It may be that the present time is a crisis of great importance in the commerce of Damascus. Railways are being made on three sides, and it is more than likely that it will regain a great deal of its ancient importance as a commercial centre. But as long as the Moslem is what he is, and as long as foreign languages are a dead letter to the majority of the population, so long will the masses of literature in the shape of catalogues and advertisements, which are forwarded by nearly every post, absolutely fail to be of any value whatever, and their only destination be the waste paper basket. No catalogue will induce people of such intensely conservative habits to take up with a new idea, a new method of doing business, a new machine, or a novelty (to them) of any kind, but personal persuasion will do much, and a sight of machines or new methods at work may convince and bring about adoption.

Commercial travellers required to push trade.

The country round Damascus has been devastated during the past year by cattle-plague, thousands of oxen and cows having died from the scourge, which no efforts are made to stop or prevent. The sheep too died in numbers from an illness the nature of which is not specified, but which is said to be induced by eating a certain kind of grass in too great quantities. In many places there were no cattle left to till the ground, and the peasants have suffered greatly from this cause; while some famous pastoral districts have been completely denuded of sheep, those that did not die of the disease being slaughtered with all speed to save something out of the general wreck. The natural result of this calamity is that the price of meat has risen higher than it has ever been known to do before, while vegetables and fruit, though plentiful, followed suit, and thus the cost of living has been nearly doubled during the last 18 months.

Effects of cattle- and sheep-plagues.

Imports.

The total of the previous year's imports amounted to 611,304*l.*, but this was exceeded in 1893 by 66,000*l.* odd, or 10 per cent. This increase is partly due to a steady rise in the demand for "Articles d'Orient" for the manufacture of which raw materials such as silk, copper, brass, and cotton are imported, partly to the increased requirements and purchasing power of the inhabitants, owing to a successful export trade, partly to the effects of the rash competition above mentioned, and lastly to the number of European railway employés.

Imports.

Of European countries, Belgium, Germany, and Great Britain divide this increase between them, while Turkey shows an augmentation of 12,000*l.*, and China has a large item to its credit for raw silk, which appears under the heading of "Other countries" in the table appended to this Report (see Annex 3). Belgian imports have risen from 23,000*l.* to 28,000*l.*, the increase being principally in iron, cloth, and woollen goods; German imports have risen from 31,000*l.* to 34,000*l.*, due chiefly to leather and

hardware, while British imports show a rise of 15,000*l.* on the former total of 270,660*l.*, which is due to an increased import of cotton yarns. The other European countries show a slight falling-off in their totals, except Russia, whose trade consists of petroleum only, an article which varies but little from year to year. France, however, has a considerable diminution, the total for 1893 being only 52,490*l.*, as compared with 63,400*l.* in 1892. French goods are losing their hold on this market in many cases, because they are too expensive for the oriental customer who seeks principally a cheap article. Thus cheap imitations of Lyons silk goods are imported from Switzerland, Germany, and Austria to the manifest detriment of the former. French woollen goods are of far too superior a quality to suit this market, and German, Austrian, and English chemicals and dyes are ousting French chemicals out of the market. France, however, has a monopoly of the import of tiles, which may be expected largely to increase when the railway cheapens transport, and, though sharing with Belgium and Holland the import of candles, is gradually claiming the lion's share of this article. Very little French sugar comes to Damascus, two-thirds of the total being sent from Austria, this sugar being very inferior and cheap.

Under the heading of England in Annex I is included India. British imports consist principally of:—

British imports. Manchester goods.

1. Manchester goods, which maintain their position of complete supremacy, Germany, Belgium, and Switzerland claiming only about 10 per cent. of the total, while about 3,000*l.* worth of "Hamidié" yarn for belts, and calico of native make is manufactured in the country itself. The "Zephir" yarn, which German merchants had attempted to introduce for weaving purposes, has proved a failure.

Cloth.

2. Cloth, of which 60 per cent. in amount comes from England, but being of very inferior and cheap quality, its value is considerably less than half the total value. This article is imported from England in steadily increasing quantities.

Woollens.

3. Woollen goods, of ordinary quality, but Germany, Austria, and Italy furnish the greater portion of these goods, while France and Belgium import the higher classes of woollens. Italy provides three-quarters of flannel and cotton underclothing, and Austria one-quarter, in addition to cotton and woollen shawls. Germany furnishes jerseys and cashmere merinos and stockings. Switzerland has also a small share in the import of these articles.

Indigo.

4. Indigo: last year an attempt was made to substitute aniline dyes for indigo for dyeing the cotton cloth that forms the principal clothing of the lower classes, but it has not succeeded; and though a large amount of indigo remained unsold in 1892, the import in 1893 is about equal to the average. It is imported from Bengal and Madras.

Rice.

5. Rice: some 8,000 sacks of Rangoon rice were taken by Damascus in 1893. Being of inferior quality to the Egyptian rice for the national dish of "pilaff," the latter is preferred, and has

a far larger sale. 2,000 sacks were furnished by Japan and 2,000 by Genoa.

6. Coffee: about one-quarter of the total import of coffee comes from Ceylon, while Yemen furnishes a small quantity of superior coffee, the rest being brought from England, Marseilles, and Trieste, and consisting of a very poor quality of coffee from Brazil, &c. Coffee.

7. Iron: Belgium and Sweden furnish the major portion of this metal. Iron.

8. Copper: which is imported from England to the amount of about 90 tons per annum, and is used for the making of household utensils. Copper.

9. Hardware: Germany, Austria, and France furnish the principal portion of this class of goods, *e.g.*, locks, iron utensils, knives, stoves, flat irons, tools, hinges, &c., while England only imports penknives, razors, and iron bedsteads. The British article is too high-priced for this market which requires a very inferior and cheap style of merchandise. Hardware.

10. Earthenware.

11. Sacking from Dundee to the amount of 4,000*l.*

12. Drugs and sundries.

In Annex I, sundries consist of paper of all kinds which is chiefly imported from Italy, Austria, and Germany, and is of very poor quality, of candles, chemicals, coal, tiles, arms (mostly Belgian imitation of English firearms), matches from Italy, Germany, and Austria; pepper and spices, carpets, tin from England; zinc from Belgium, cochineal from France, alum from France, England, and Italy, marble from Italy, planks from Galatz, buttons, linen, mirrors, raw cotton from Aleppo, sewing machines from America and Germany, soap and liquors.

In addition to the total of imports as stated in the annex, some 120,000 sheep are sent into Damascus per annum from the surrounding country and from northern Syria and Caramania. Consumption of sheep.

The consumption of tobacco, is also not included in the returns, but it is computed that about 65,000*l.* worth of tobacco was consumed in Damascus and its environs during 1893. Tobacco regie.

Exports.

The total of exports in 1893 amounted to 456,780*l.*, or an increase of 21,000*l.* over that of 1892. This is due partly to a good hemp harvest and partly to an increased demand for silk and cotton manufactures. Exports. Increase of 5 per cent. in 1893.

The fruit harvest was fair, but 1892 was an exceptional year for fruit, and thus there was a considerable diminution in the amount of apricots and kernels exported. The price was however, higher on account of the lessened produce, and the value is almost identical for the 2 years. The corn harvest was good and there was a slight increase in the weight of flour exported to Beyrout. Fair harvest.

Damascus specialities, such as worked brass, inlaid furniture, Articles d'orient.

curtains, and divan covers, continue to find favour with the outside world, and the production steadily increases.

Wool and skin export checked by sheep disease.

The havoc wrought by disease among the flocks of sheep and goats has not told so seriously as might have been expected on the export of wool, but the value of lamb and goat skins shows a heavy falling-off. In 1893, 75,000 skins were estimated at 5,450*l.* only, and this on account of their bad condition, they having been mostly taken from diseased animals.

Wool export.

The price obtained for wool was lower than in the previous year, as wool is almost entirely exported to America and buyers in that country refused to make large purchases in view of the new tariff. Of the total of 825 tons exported all except about 65 tons is unwashed. The washed wool is sent to Italy.

Various kinds of silk and cotton fabrics.

Silk and cotton fabrics are of various kinds.

(1) "Cottoni," which is a kind of satin with cotton backing and is used for upholstery principally.

(2) "Alaja," which is made of mixed cotton and silk, and is used for articles of apparel. "Cottoni" and "Alaja" are exported in great quantities to Egypt, Bagdad, and other parts of Syria and Palestine.

(3) "Keffiyeh," which consists of silk or silk and cotton handkerchiefs and is used for headgear as a protection against the sun.

There are also various kinds of minor importance.

There are in all in Damascus about 2,000 hand-looms employed in the manufacture of these fabrics and of curtains and divans.

The total export in 1893 amounted to 153,000*l.* as compared with 135,000*l.* in 1892, showing an appreciable and satisfactory augmentation.

Raisins. Prices low.

The raisin harvest was plentiful, but prices ruled very low, there being but small demand for the same; so that, though nearly treble the amount was exported in 1893, the total value was only 66 per cent. higher than 1892 (see Annex 2).

Sundries.

In the return of exports (Annex 2) sundries consist of drugs, arms (re-exported to the Syrian desert and the surrounding country), nuts, aniseed, butter, starch, almonds, hemp-seed, and beetroot.

Public Works.

Improvements in the city.

The municipality of Damascus has bestirred itself to the extent of building a new town-hall and has undertaken the construction of a new bazaar to replace the old Greek bazaar, a work the utility and desirability of which cannot be denied, but which destroys much of the interest of this city from a traveller's point of view. At the same time it is to be regretted that the streets are allowed to fall into absolute disrepair and are in many places impassable for carriages.

Roads.

The main road to Aleppo through Homs and Hamah, which was under construction, has been proceeded with very slowly, and

it is to be feared that the proposed railway to Homs, Hamah, and Biredjik has destroyed the interest the local authorities displayed in this work and has thus ruined its chances. No other roads have been commenced, much as they are needed, want of funds being pleaded as the reason.

Beyrout-Damascus railway.

The narrow-gauge railway from Beyrout is being rapidly pushed on, but the work is very heavy and much delay has been caused by the question of expropriation. It is not likely that it will be finished for at least 2 years more.

The Hauran line approaches completion.

The Damascus-Hauran line is nearly complete, except for station buildings which are still in an unfinished condition; but in spite of this defect it will probably be opened for traffic during the next month. Until the railway to the coast is completed, the Hauran railway will only have the local traffic between the Hauran and Damascus to deal with, and this will damage the landowners in the immediate district round Damascus as it will lower the price of cereals. The consequence is that the Moslem proprietors of land are strong partisans of the Haifa line and are most anxious to see it pushed on.

Prospects of the Haifa-Damascus Railway.

With regard to the Haifa line I have no certain information, but rumours are spreading to the effect that the company is formed and that the works will be commenced immediately. In the interests of this city it is devoutly to be hoped that this is true. Certainly this railway should have a prosperous future before it. If well managed it ought to be able to obtain the carriage of all the interior trade, and under any conditions it is so favourably circumstanced that it should be impossible for the Beyrout-Damascus railway to compete. As I have in former years reported fully on this question it is unnecessary to go further into the matter here.

Annex I.—RETURN of Principal Articles of Import to Damascus during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Cotton yarns ..	Bales ..	3,045	96,300	2,550	83,250
T-cloths, &c. ..	Pieces ..	324,000	110,000	300,000	112,500
Cotton prints ..	..	..	10,000	..	7,000
Woollens	..	..	20,000	..	14,100
Cloth	..	..	22,000	..	20,000
Silk and muslin fabrics	Cases ..	190	12,200	142	8,250
Fezzes	,, ..	88	7,000	65	4,000
Raw silk	Bales ..	885	80,000	665	60,000
Indigo	Cases ..	269	16,280	275	17,410
Petroleum	,, ..	56,000	18,000	60,000	17,256
Rice	Cwts. ..	41,870	40,000	37,500	32,000
Coffee	,, ..	7,500	40,000	6,250	36,000
Sugar .. .	,, ..	37,500	40,000	50,000	60,000
Salt	,, ..	31,250	8,000	20,000	6,150
Iron	Tons ..	1,000	12,000	1,025	13,000
Copper and brass ..	,, ..	135	9,720	133	8,778
Leather	..	..	22,800	..	14,000
Hardware	..	..	12,000	..	10,600
Drugs	..	..	8,000	..	7,200
Earthenware and glassware ..	..	..	12,000	..	9,000
Sundries	..	..	81,200	..	70,800
Total	..	..	677,500	..	611,304

Annex II.—RETURN of Principal Articles of Export from Damascus during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Flour	Cwts. ..	250,000	72,000	187,500	70,000
Grain	,, ..	25,000	7,000	..	7,600
Wool	Tons ..	825	25,340	..	27,700
Silk and cotton fabrics	..	..	153,000	.	135,000
Apricot paste ..	Cwts. ..	45,000	20,000	45,000	18,000
Dried apricots ..	,, ..	10,000	14,800	14,400	15,700
Kernels .. .	,, ..	11,600	13,200	17,500	14,000
Raisins	,, ..	10,000	3,570	3,750	2,160
Brass and inlaid work	..	..	14,000	..	13,000
Liquorice	Cwts. ..	5,200	1,900	6 250	2,300
Skins	.	75,000	5,450	70,000	6,880
Biscuits	Cwts. ..	4,000	2,600	5,000	3,200
Guns	Cases ..	170	2,720	110	1,640
Ropes	Cwts. ..	25,000	32,000	11 250	15,290
Fruits	,, ..	12,500	8,500	12,500	8,000
Sundries	.		80,700	.	85,800
Total	..	..	456,780	..	425,380

Annex III.—TABLE showing the Total Value of all Articles Exported from and Imported from and to Foreign Countries during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Austria	12,450	7,243	59,350	63,500
Belgium	..	..	28,770	23,578
England	16,720	17,200	285,330	270,660
France	10,000	12,980	52,490	63,400
Germany	12,400	10,500	34,100	31,100
Italy	7,800	4,000	20,760	22,950
Russia		1,500	18,000	17,266
Turkey	356,600	344,660	105,600	97,350
Other countries ..	40,810	27,300	73,100	21,500
Total	456,780	425,380	677,500	611,304

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1894.

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TURKEY.

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ON THE

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REFERENCE TO PREVIOUS REPORT, Annual Series No. 1279.

Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.

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No. 1418.

Reference to previous Report, Annual Series No. 1279.

TURKEY.

BEYROUT.

Acting Consul-General Eyres to the Earl of Kimberley.

My Lord, *Beyrout, June* 6, 1894.

I HAVE the honour to transmit herewith to your Lordship a Report by Mr. Vice-Consul Hallward on the Trade of this District for the year 1893.

I have, &c.
(Signed) H. C. A. EYRES.

Report on the Trade and Commerce of the Consular District of Beyrout for the Year 1893.

ABSTRACT of Contents.

	PAGE
Decrease of trade	2
Chicago Exhibition—	
Various sections	2
Circus	2
Remarks on shipping	3
Imports	4
Exports	6
Port	6
Railways	8
Local companies	10
Tables—	
Shipping	11
English imports to Beyrout	12
Exports from Beyrout	12
„ Sidon	12
„ Haifa and Acre	13
„ Tripoli	13
Imports to Tripoli	14
Statistics of Beyrout Water Company	14

Decrease of trade to Beyrout.

The year 1893 shows a distinct falling off in the volume of trade passing through Beyrout, there being a marked decline especially in the import of cottons and rice; this is not due to temporary depression of trade, but to the fact that whereas Beyrout has hitherto been the emporium for the whole of Syria and part of Asia Minor, it is now becoming the practice to ship direct to the different parts of the coast, partly because capital is now more widely distributed and not so much centralised in Beyrout, and partly on account of the charges for landing goods at this port having been increased by the establishment of quay dues.

Owing to greater distribution of capital.

And quay dues.

Growth of town.

The town itself, though there has been no great activity in building in the past year, has hitherto kept up a fairly level rate of development; house rent and the general cost of living show a decided upward tendency; new taxes have been lately imposed on meat and other articles of consumption with a view to carrying out various municipal improvements, this form of tax finding special favour with the local authorities as foreigners are thereby made to contribute to indirect taxation, whereas they are generally exempt from direct taxation.

New taxes.

Especially on foreigners.

Fewer bankruptcies.

There have been fewer bankruptcies than in 1891–92, a temporary calm rather than a return to a sounder system of trading.

Considerable emigration.

Emigration to the western hemisphere continues on a considerable scale, some 3,000 souls having left from the port of Beyrout and 4,000 souls from that of Tripoli.

Turkish section at Chicago Exhibition.

Chiefly taken by Syrians.

Café.

Theatre.

A Turkish section was taken up at the Chicago Exhibition by a company in Constantinople who issued 100 shares at 200*l*.T.* each. The ground was leased by them to various separate undertakings which were chiefly carried out by Syrians with capital from Beyrout. The principal were:—Café, 15 shares of 200*l*.T.; capital, 3,000*l*.T.; profit, 145*l*.T. on each share, or 72½ per cent.; theatre, 20 shares of 320*l*.; capital, 6,400*l*.T.; profit, 280*l*.T., or 87½ per cent.

Damascus Palace and Bedouin show.

Panorama from Beyrout.

Panorama from Damascus.

Restaurant.

Refreshment stall.

Sweet shop.

Damascus Palace and Bedouin show:—16 shares of 150*l*.; capital, 2,400*l*.; total profit, 3,000*l*., or 125 per cent.

Panorama (Beyrout Company):—3 shares of 500*l*. each; capital, 1,500*l*.; total profit, 1,500*l*., or 100 per cent.

Panorama (Damascus Company):—Capital, 2,000*l*.; profits, nil.

Turkish restaurant:—Capital, 3,000*l*.; loss, 500*l*.

Refreshment stall:—Capital, 2,000*l*.; profit, 600*l*., or 30 per cent.

Sweet shop:—Capital, 1,000*l*.; profit, 1,000*l*., or 100 per cent.

Circus.

Besides the above which were all included within the area of the Turkish section, an independent company was formed in Beyrout with a capital of 20,000*l*. in 100 shares of 200*l*. for running a sort of circus in the style of "Buffalo Bill," 40 horses and 10 camels were purchased at very high prices, and 70 men and boys engaged, and a special steamer chartered to convey them direct to New York, whence they were to proceed to

* 1*l*.T. = 18*s*. 4*d*.

start the show in Chicago. This enterprise proved a disastrous failure; the ground engaged by the agent of the Company was at a considerable distance from the town, and the show had to be moved to a better site; a fire then broke out on the premises, and seven of the animals were burnt; finally, they secured a place within the Exhibition, but their expenses were heavy, and the takings did not suffice to cover the daily expenses; the managers quarrelled among themselves, and finally the remainder of the animals were sold by auction by the Local Authorities in payment of debts, at prices far below those paid for them in Syria, with the result that scarcely sufficient funds remained to pay the wages of the employés and their return journey to Beyrout, the capital was entirely lost.

Failure.

Loss by fire.

Disagreement among managers.

Animals sold to pay debts.

Capital lost.

The shipping returns again show an increase on those of the preceding year, the advance being particularly marked in the case of British shipping, and this in spite of a decrease in the amount of British imports. This is due to the fact that all the railway material for the Beyrout-Damascus line is being brought in British ships from Antwerp, and moreover the "Prince Line" has begun running steamers regularly between the Syrian coast and England since last May, most of their business being with Jaffa, Tripoli, and Mersina, but as they always call at Beyrout they swell the returns of this port. This Company has lately started a regular line with fortnightly sailings each way between Manchester and the Syrian coast, and monthly sailings from London with greatly reduced freights; the ordinary freight for Manchester goods from Liverpool to Beyrout having been 1*l.* 5*s.* per ton, they offer to take goods at 18*s.*

Increase of shipping.

Due to import of railway material.

Prince Line.

Between Manchester, London, and Syrian coast.

With reduced freights.

Bell's Asia Minor Line continue to run between the principal ports from Alexandria to Mersina, a good deal of their business consisting in transhipment from Alexandria. This business will be practically put an end to by the Prince Line establishing direct and regular communication with England. The Khedivial Line maintain a weekly service between Alexandria and Mersina calling at Syrian ports, and of the other three subsidised lines which serve this coast starting from Alexandria, the Messageries Maritimes taking 10 days and the Russian Company 6 days run fortnightly to Smyrna and Constantinople, calling again at Beyrout on the return journey, while the Austrian Line has a bi-weekly service, one to Cyprus, Scio, Smyrna, and Constantinople taking 8 days; the other to Scandervan, Mersina, Smyrna, and Constantinople, taking 10 days each way. The Austrian are the only steamers which now call regularly at Cyprus, consequently our communications with that island are limited to once a fortnight.

Bell's Line.

Khedivial Line.

Messageries maritimes.

Russian Company.

Austrian Lloyd.

Communication with Cyprus.

There is a discrepancy between the return of British shipping sent to the Board of Trade at the beginning of the year and that included in the subjoined list, the total given in the latter being considerably in excess of that given in the former. The difference is accounted for by the omission in the first return of steamers (of Bell's Line for instance) touching at Beyrout on the return journey from the north, and only remaining a few hours.

Returns of British shipping.

Imports.

The following is an approximate estimate of the value of the principal items of manufactured cotton and piece-goods exported from England last year to Beyrout :—

Cotton and woollen goods.

Articles.	Value.
	£
Grey T-cloth and shirtings	340,000
White madapolam bleached shirtings ..	90,000
Grey bleached and coloured yarns ..	111,000
Prints and fancy piece-goods	180,000
Woollens, linens, job piece-goods ..	50,000

Cloth.

Cloth for European clothes came from Belgium, France, and England to the value of about 5,000*l.* each, and about 3,000*l.* worth from Germany and Austria respectively. There is also a common sort of cloth of which about 10,000*l.* worth came from England.

Description.	Value.
	£
Germany sends plain coloured cloth ..	15,000
France „ „ ..	5,000
Austria „ „ ..	30,000

Silk dresses.

About 75,000*l.* worth of silk dresses came from France, and another 25,000*l.* from Switzerland, Italy, Austria, and Germany.

Dyed yarns.

There has been a large falling off in the import of dyed yarns from Switzerland, only about 100 bales having come last year, cheap undyed yarn is now imported from England and dyed in the country, the result being a cheaper article though inferior in quality.

Printed stuffs.

Printed stuffs such as Moslem women use for their veils are brought from Switzerland, about 400 cases having come and been sold at about 30*l.* per case; also about 150 cases of printed cotton handkerchiefs at the same price.

			Quantity.	Price.
				£ s.
Glassware.	Glassware—			
	Belgium	Kegs	200	4 10
	France	„	150	6 0
	Bohemia	Cases	250	7 0
Window glass.	Window glass—			
	Belgium	„	5,000	..
	Railway material—			
	Belgium	Tons	2,753	..

English bar iron is now entirely driven out of the market by the Belgium article, which is cheaper and can be brought at a lower freight; freight from Antwerp being 12*s.* 6*d.* per ton, and from Liverpool 15*s.* per ton. The relative prices per ton are:— Iron.

	Price per Ton.
	£ *s.*
English.	
Best..	5 0
Best best	5 5
Best best best	5 10
Belgian.	
No. 3	4 8
„ 4	4 14
„ 5	5 0

There are still about 300 tons of English iron on the market which the owners find it difficult to sell even at a loss.

About 40 tons of galvanised iron came from England.

The import of rice like that of cottons, &c., has greatly diminished for the reasons explained above. Rice.

750,000 tiles were brought from Marseilles. Tiles.

1,000 tons of marble came from Italy. Marble.

There is again a fall in the import of petroleum, 76,122 cases having come last year, against 98,954 cases the previous year. Petroleum.

33,000 bags of Portland cement ("chaux hydraulique") came from France chiefly for the use of the Port and Railway Companies, and were sold at an average price of 2*s.* 6*d.* per bag. Portland cement.

96,877 planks, valued at 18,000*l.*, came from Caramania, and 1,450 tons of timber from Galatz estimated at 19,000*l.* The import of foreign timber is on the increase as it is found to be better suited for building purposes than the Caramanian. Wood.

The import of earthenware shows a decrease, 1,500 barrels against 2,100 barrels in 1892. 700 barrels came from France, 500 barrels from Belgium (against 300 barrels in 1892), and 300 barrels from Italy. The importation from Belgium has, therefore, increased, while that from France and Italy has largely diminished. The foreign earthenware is said to be preferred to the English, as being superior in shape and colour. The average value of the French casks is 2*l.* 5*s.*; of the Belgian and Italian 2*l.* Earthenware.

Besides the coal imported from England, 1,700 tons came from Belgium; also 3,100 tons of Belgian briquettes, and 9,000 tons of French briquettes. Coal.

The dearness of native charcoal has occasioned a demand for gas coke for domestic use. Last year 800 tons arrived from France, 400 tons from England, and 300 tons from Belgium, Coke.

besides the coke from the gas factory at Beyrout, amounting to 1,500 tons per annum. It sells here at about 2*l.* per ton.

Charcoal. 750 tons of charcoal came from Salonica and the Black Sea, which sold at 3*l.* 12*s.* per ton.

Leather. Boot leather to the value of 67,000*l.* came from France.

Varnished leather from Austria, 10,000*l.*

Hardware. Hardware comes mostly from Germany; a little, such as the better class of workmen's tools, from France. Cutlery of very inferior quality coming from Germany is sold as French or English wares. The better sort of cutlery comes from France; very little is now sold.

Coffee. Nearly all the coffee consumed here comes through France from Réunion and Rio, chiefly from the latter. 5,000 bags, weighing about 1½ cwts., came last year, and were sold here at 4*l.* 15*s.* per bag.

Exports.

Silk. About 347 tons of silk yarn were exported to France, an increase of about 50 tons on the export of 1892. The year, however, was a bad one for the local merchants, owing to the extraordinary fall in price from 76 fr. to 39 fr. per kilo.

Wine. A small quantity of wine was exported to Egypt and France, but at present this trade shows no sign of development.

Grain. The export of grain from Syria was very small, prices being low and harvests abundant elsewhere. Owing to the primitive methods of agriculture, and the want of means of transport, the grain of this country cannot compete with that of Russia and America in the European market. It is to be hoped that the construction of railways will do something to remedy this state of things.

Port.

Harbour works not finished. The harbour works are not yet finished; the custom-house quay on which goods are now landed is complete, and so is the foundation of the outside breakwater, but the wall on the breakwater still wants some 350 metres to make its full length of 800 metres, and the traverse on the south side is incomplete.

Quay dues. The Port Company, however, has been levying dues on ships and lighters since April last, and quay dues on goods since June, when the new custom-house was opened. They also made an attempt to monopolise the portenage through the custom-house, but failed owing to the opposition of the native porters, but they have lately been making fresh efforts to get this business into their hands.

Portenage through custom-house.

Harbour not much used yet. Hitherto but a small proportion of the shipping has come inside the harbour, which has been somewhat obstructed by the lighters engaged in the works, and also owing to the small advantage to be derived in return for the payment of port dues, the weather being rarely sufficiently rough to prevent the loading or discharging of a ship.

The fact is that so far the Port Company, with its heavy, and in some cases unreasonable, charges, has simply served as an incubus on the commerce of Beyrout, the advantages it has to offer being in the opinion of the local commercial community entirely outweighed by the heavy taxes it imposes on almost every branch of trade. The charges levied by the company are threefold: (1) The harbour dues on steamers anchoring in the port; (2) the tax of 10*d.* levied on all lighters every time they touch the quay to discharge or load cargo; (3) the quay dues taken on all goods landed in Beyrout, whether on the quay or outside the harbour; besides which the company are now trying to obtain permission to add a fourth tax by getting the monopoly of the porterage through the custom-house, their intention being to impose a graduated tax according to the value of the goods based on the port tariff, the present system being simply to pay the porters according to weight. The advantage they hold out in compensation for the great increase of charges which will be effected by this arrangement is that the company will undertake to indemnify owners for any loss or damage done to their property in transit through the custom-house, but merchants appear to be sceptical of the value of this benefit, as they have hitherto energetically opposed the company's attempts to obtain this monopoly.

Port Company detrimental to trade and unpopular with merchants.

Harbour dues.

Lighter dues.

Quay dues.

Company is trying to get monopoly of porterage.

But are opposed by merchants.

The dues on ships are not excessive, and may be considered a fair price for the protection and convenience afforded in bad weather, but those on lighters are most oppressive and unfair, and are aggravated by the absurd regulations respecting the use of lighters in this port. All the lighters, with the names of their owners, are numbered, and are under the control of the Captain of the Port, a Turkish official, who takes his orders from the Ministry of Marine. He sends them in rotation to anyone wishing to make use of them. They cannot be selected by private arrangement, but application must always be made to the Captain of the Port, and any lighters and men that he chooses to send must be accepted, whether suitable or unsuitable, and the majority of the lighters being small and not holding more than 6 tons, the discharge of a cargo entails many journeys backwards and forwards between ship and quay, and the tax has to be paid each separate time. Larger lighters are to be had, and are being used to discharge material for the railway outside the port, this being exempt from customs duty, but they are not allowed to be used for discharging ordinary cargoes at the custom-house. At the same time no effective control is exercised over the boatmen to ensure their keeping the boats in proper repair, or their taking reasonable care of the goods they have to handle. Leaky boats are constantly used to the great detriment of cargoes, and goods (especially iron) are dropped into the sea simply through the carelessness of lightermen. A further result of this system is that the lightermen being exempt from fear of competition are in a position to fix a tariff of their own, which they have maintained at the same rate that was in force before the construction of the quay, and which they enforce equally on goods coming from ships

Harbour dues are moderate.

Lighterage dues excessive.

Lighters are under control of Captain of Port.

And cannot be chosen at will.

Due paid by lighters for every journey.

No control over the lightermen.

Who damage cargoes through carelessness.

Very inconvenient system.

outside and inside the harbour. Comment on such a state of things is superfluous.

Difficult to obtain copy of tariff.

With regard to the quay dues, we are confronted with the primary difficulty of discovering what they amount to on account of the impossibility of obtaining a copy of the tariff, except by special favour of the President of the Company. The public have, therefore, to trust largely to the good faith of the company's officials, and this has already proved at fault by the confession of the heads of the administration, who are now engaged in endeavouring to investigate certain cases of fraud on the part of their employés. The port charges, it should be said, are strictly enforced by the custom-house officials, who refuse to deliver any goods for the charges on which receipts have not first been obtained from the Port Company. One of the most vexatious of their charges is that on parcels arriving by parcels post, dues being taken on everything, however small or worthless. Thus, a charge of 6*d.* was made on a piece of wedding cake sent from England.

Fraud discovered on part of Company's officials.

Port charges enforced by custom-house.

Vexatious charges on parcels.

Dues levied on goods outside custom-house.

A very unfair charge.

Another grievance is the levying of quay dues on goods landed outside the port. This is done on the strength of a clause in the Port Company's Convention with the Government, which states that all goods must pass through the custom-house. But as a fact there are some goods, such as coal, which are not allowed to be landed on the custom-house quay, and are obliged to be landed quite outside the port, it is therefore manifestly unfair that such goods should pay a quay duty, for which they get no benefit whatever, and which simply means a dead loss of 50*l.* on a cargo of 1,200 tons.

In general the whole system of the port company is at present regarded with disfavour by nearly all merchants, native and foreign. They simply consider it as supplying so much more expense and vexation in addition to that already to be undergone at the custom-house, and that, so far from attracting trade to Beyrout, it is calculated to drive it away to other places on the coast. It seems strange that the company in their own interest do not look at this side of the question and take more care to abstain from action, which must prove detrimental to the prosperity of the place, and consequently, sooner or later, to themselves. It is possible that one or two years' experience may lead them to revise their tariff, but meantime, should the Haifa Railway be carried through to Damascus, Beyrout may have lost its commercial position and never be able to recover it.

Port company's action tends to drive away trade, and is contrary to their own interests.

Beyrout may lose its commercial position.

New custom-house.

The new custom-house is a much more commodious building than the old one, and the despatch of business ought to be proportionately quicker and easier than before. To effect this, however, a change of management, as well as of building, would be necessary; as it is, the old abuses continue, and there is no practical improvement whatever.

No improvement.

Railways.

Beyrout-Damascus Railway.

The work on the Beyrout-Damascus line progresses apace.

The Hauran extension from Damascus to Mezarib (length 65 miles) has already been laid down, and will shortly be completed and open for traffic. Studies are also being made for a line from Damascus to Homs, Hama, Aleppo, and Birejik on the Euphrates, a distance of about 300 miles. The concession for all three lines are in the hands of a French company. The first two are narrow gauge lines, the last-named is to be normal gauge, and as the Government consider it of strategic importance they undertake to guarantee a certain profit per kilometre, but the specifications have not yet been drawn up as the exact route that the line is to follow has not yet been decided.

Damascus-Mezarib line.

Projected line from Damascus to Birejik.

The Syrian Ottoman Railway Company, who formally inaugurated their works on the Acre-Haifa-Damascus line 15 months ago, have not hitherto made much progress, but, as considerable capital has already been sunk in the enterprise, it cannot be supposed that the promoters of the scheme will be willing to let it drop.

Syria Ottoman Railway Company has not yet done much.

In any case the construction of this line is highly desirable in the interests of Syrian trade and agriculture were it only to act as a competitor to the Beyrout-Damascus route by making a trade centre of Haifa, and providing a means of evading the heavy charges imposed at the port of Beyrout.

Construction of Haifa-Damascus line very desirable.

To English trade this line will be of great importance as supplying a cheap and easy means of transport for Manchester goods, &c., to the interior.*

Especially to British trade.

A concession has also been granted to a native of the Lebanon for the construction of a steam tramway along the coast of the Lebanon between Tripoli and Sidon. A formal inauguration of the enterprise took place some months since, but nothing further has yet been done in the matter. From the investor's point of view this line, if economically constructed, would probably be the most profitable of any yet projected in Syria. An attempt has been made to raise the capital in France, but it does not seem to be forthcoming at present.

Concession for line along coast of Lebanon.

In the Beyrout trade report for 1891–92 a passing reference was made, in reviewing the advantages of the Haifa-Damascus line as compared with other railways planned or constructed in Syria, to the Homs-Tripoli route, which has been more than once recommended by engineers and others as favourable for the construction of a railway to the interior of Syria, but for which no concession has hitherto been granted.

The comparison that was drawn between the various railway schemes was intended to apply rather to the geographical aspect of the case, and simply to give in a summary manner the particular advantages of the Haifa-Damascus route without necessarily condemning the other railway schemes mentioned, which may of course offer other advantages, from a commercial or engineering point of view, calculated to outweigh in the opinion of some those mentioned in the report.

* For further details respecting these lines, see Commercial No. 1279, Foreign Office, Annual Series, 1893.

Thus many will maintain that the Alexandretta-Aleppo line is one that would eventually pay better than any other in Syria, and similarly it may fairly be argued that the Tripoli-Homs route has special advantages of its own; it is the most central and leads more directly from the coast to the interior than any other which does not traverse mountains, and moreover, Tripoli offers special facilities for the construction of a harbour.

The statement that it would be expensive to construct must obviously be taken relatively and not absolutely. It is not necessary to be an expert to see that such a line offers no very formidable engineering difficulties, especially when compared with the Beyrout-Damascus line; but it will probably be admitted that mile for mile the Haifa-Damascus line is the cheaper to construct of the two.

Nor again was the allusion to the comparative want of water intended to imply that the country between Homs and Tripoli is a barren desert, but that the basaltic hills of which it largely consists are certainly inferior in fertility to the plains of Jezreel, Esdraelon and Jolan.

In conclusion, it may be well to point out that the extension of the proposed line from Homs southwards to the Bekaa and Damascus would be hampered by the double competition of the Beyrout-Damascus and Haifa-Damascus lines, while a concession has already been granted for a line from Damascus to Homs, Hamah, Aleppo, and Birejik, which would tap the country to the north.

Local Companies.

Beyrout Water Company.

The water company shows a steady increase in gross revenue, chiefly, as will be seen from the subjoined figures, owing to increase of house contracts, the number of irrigation contracts being comparatively insignificant and showing little tendency to develop.

Gas Company.

The Gas Company is in anything but a flourishing condition, beyond the fixed revenue they get from the municipality for lighting the streets their business is very small, and there is little prospect of improvement. The company will probably have to be put on an entirely new basis before long.

Tobacco Régie.

The Tobacco Régie sold about 500,000 kilos. (50 kilos. = 1 cwt.) in the provinces of Beyrout, Damascus, and Jerusalem between March 1, 1892, and March 1, 1893, which is a slight decrease from the previous year. The smuggling has been checked to a certain extent by the presence of a coastguard steamer.

The peasants are supposed to take out an official permit from the company for cultivating tobacco. The official returns of the Régie give the production for that period as 900,000 kilos., but at least double that amount is known to have been produced. The principal tobacco growing district is Lattakia, after which come Sidon, Hasbeya, and Rashaya (the country round Mount Hermon).

Tumbac Régie.

Up to two years ago the tumbac (a peculiar sort of tobacco used for the water-pipe) was exempt from the tobacco monopoly, but in April, 1892, a concession having been granted to a company for the monopoly of this article, the tumbac was put on the same footing as the tobacco, but in the hands of a separate company, which paid a certain sum per annum to the Tobacco Régie for assistance to be given by their agents in checking smuggling.

Much tumbac smoked in Beyrout and Damascus districts.

Beyrout and Damascus are the most important provinces in Turkey for the consumption of tumbac. The sales at first went down considerably, large stocks having been laid in by merchants before the establishment of the monopoly, and there being considerable difficulties to contend with at first. The sales in the whole of Syria from Aleppo to Gaza from April to December, 1892, were 403,450 kilos.; from January to December, 1893, 627,638 kilos.

Amalgamation of tobacco and tumbac companies.

An amalgamation is now being made between the tobacco and the tumbac companies in Syria, an arrangement which will probably prove highly beneficial to both parties.

RETURN of all Shipping at the Port of Beyrout during the Year 1893.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	151	108,126	151	108,126
Ottoman	2,428	45,016	110	89,257	2,538	134,273
French	...	...	80	134,557	80	134,557
Austrian	12	2,426	107	130,772	119	133,198
Egyptian	...	...	106	107,365	106	107,365
Russian	...	...	52	77,932	52	77,932
Italian	26	6,848	12	6,983	38	15,831
Greek	43	11,897	2	1,900	45	13,797
Norwegian	...	...	15	8,690	15	8,690
German	...	...	1	1,197	1	1,197
Total	2,509	68,187	636	666,779	3,145	734,966
„ for the year preceding ...	2,553	61,896	565	570,157	3,118	632,053

RETURN of Principal British Imports to Beyrout during the Years 1892–93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Manchester goods	Bales and cases ...	17,071	1,023,660	12,750	765,000
Woollens	Cases ...	778	[illegible]	745	26,500
Indigo	,, ...	600	34,100	450	24,000
Iron—					
British	Tons ...	580	4,080	162	820
Swedish	,, ...	400	3,000	600	4,200
Coal	,, ...	1,500	1,500	500	500
Patent fuel	,, ...	1,825	1,900	5,776	6,000
Hardware	Casks ...	847	6,776	471	2,565
Copper sheets and bottoms ...	Tons ...	270	15,500	266	14,000
Rice—					
Rangoon	Bags ...	25,000	23,800	12,000	11,400
From Rangoon	,, ...	2,300	2,100	...	...
Sacks (India)	Bales ...	1,300	12,000	2,400	16,800
Sacking (Dundee)	,, ...	500	4,000	100	3,000
Hides (India)	,, ...	3,400	5,100	1,200	4,200
Bar tin	Barrels ...	441	5,290	634	6,974
Alum, soda ash, and soda ...	,, ...	3,100	6,200	2,300	4,600
Bedding	Cases ...	620	2,480	43	258
Linseed oil	Barrels ...	500	500	352	400
Cotton, pepper, and spices ...	Bags ...	2,800	12,000	3,500	14,000
Sundries	...	...	34,000	...	42,000
Total	...	...	1,259,016	...	968,000

RETURN of Principal Exports from Beyrout for the United Kingdom.

Articles.		Quantity.
Wool	Bales.. ..	1,800
Bones	Tons	110
Rags	Bales.. ..	120
Apricots	Bags	130
Bitumen	Cases	350

RETURN of Principal Articles of Export from Sidon during the Years 1892–93.

Articles.		1892.		1893.	
		Quantity	Value.	Quantity.	Value.
			£		£
Silk yarn	Cwts. ...	1,175	...	...	...
Wool	Bushels ...	16,000	...	...	...
Barley	,, ...	32,000	...	...	...
Maize	,, ...	8,000	...	...	...
Lupins	,, ...	20,000	...	...	...
Sesame	Cwts. ...	[illegible]	...	54,000	12,000
Linseed	Bushels ...	[illegible]	...	...	...
Beans	,, ...	8,000	...	30,000	5,000
Peas	,, ...	12,000	...	...	...
Figs	Cwts. ...	10,000	...	15,000	3,000
Cocoons and silkworms ...	Number ...	15,000,000	...	21,000,000	15,000
Lemons	...	...	3,000	...	4,000
Potatoes	...	...	7,000	...	...
Lemonade	Cwts.	2,000	...	...	...
Total	...	...	5,000	...	39,000

RETURN of Principal Articles of Export from Acre and Haifa during the Years 1892–93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Wheat	Quarters ..	50,110	70,154	13,910	12,519
Dari-seed	,, ...	18,301	15,138	5,708	4,285
Beans	,, ...	3,254	3,732	2,240	2,352
Chick-peas	,, ...	7,360	8,280	233	299
Sesame	Lbs. ...	11,076,624	69,228	3,679,677	22,997
Oil	,, ...	514,312	7,500	1,721,034	16,732
Soap	,, ...	57,794	963	53,532	892
Charcoal	,, ...	878,755	915	2,226,888	3,092
Cheese	,, ...	...	...	339,300	4,241
Karoobs	,, ...	...	...	1,118,241	931
Sundries	...	...	5,204	...	3,500
Total	...	...	181,114	...	71,840

RETURN of Principal Articles of Export from Tripoli to Foreign Countries during the Years 1892–93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Sheep	..	32,000	..	..	..
Horses	..	106	..	..	..
Oil	Barrels ..	14,409	..	847	5,082
Soap	Cases ..	5,855	..	4,500	13,500
Silk	Bales ..	1,510	..	800	64,000
Barley	Quarters	1,228	..	..	..
Dari-seed	,,	6,220	..	..	..
Wheat	,,	9,260	..	4,508	6,524
Sponges	Bales ..	1,348	..	500	3,000
Beans	Quarters	3,220	..	7,500	7,000
Wool	Bales ..	890	..	..	8,900
Sundries	..	..	..	..	16,000
Total	..	..	..	..	124,406

RETURN of Principal Articles of Import to Tripoli from Foreign Countries during the Years 1892–93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Tiles..	Pieces ..	970,000	..	318,000	1,500
Silk	Bales ..	657	..	..	..
Planks	Pieces ..	125 270	..	110,000	10,000
Petroleum	Cases ..	42,000	..	33,000	11,000
Wine	Barrels ..	280	..	..	..
Iron..	Tons ..	95	..	150	750
Cotton	Bales ..	129	..	130	1,040
Paint	Barrels ..	94	..	60	90
Hides	Pieces ..	470	..	..	..
Rice	Bags ..	22,000	..	12,000	10,000
Sugar	,, ..	24,000	..	15,000	13,500
Manufacture ..	Bales ..	1,000	..	1,300	65,000
Hardware	Cases ..	790	..	950	2,850
Earthenware ..	,, ..	387	..	530	1,590
Sundries	..	..	..	..	18,000
Total	..	..	..	..	144,320

STATISTICS of Beyrout Waterworks Company.

Financial Year ending—	Gross Revenue.	Expenditure.	Net Returns.	House Connexions.	Irrigation Connexions.
	£ s. d.	£ s. d.	£ s. d.		
September 30, 1890 ...	12,011 15 0	3,122 3 0	8,889 12 0	1,982	137
,, ,, 1891 ...	12,398 9 9	3,244 2 2	9,154 7 7	2,130	125
,, ,, 1892 ...	12,494 10 3	3,484 5 9	9,010 4 6	2,146	143
,, ,, 1893 ...	17,784 3 8	3,830 14 9	8,953 8 10	2,423	142

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FOREIGN OFFICE.

1894.

ANNUAL SERIES.

No. 1424.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE AND FINANCE.

TURKEY.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF BAGHDAD AND BUSSORAH.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1320

Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.

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1340.	Baltimore	1½d.	1400.	Amoy	1½d.
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1343.	Saigon	1½d.	1403.	Aleppo	1d.
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1348.	Amapala	½d.	1408.	Hankow	1d.
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1350.	Jerusalem	1d.	1410.	Copenhagen	½d.
1351.	Santiago	1d.	1411.	Damascus	1d.
1352.	San José	1d.	1412.	Chefoo	3d.
1353.	Trieste	3½d.	1413.	Swatow	1d.
1354	Madrid	2d.	1414.	Mannheim	1½d.
1355.	Teneriffe	½d.	1415.	Fiume	2d.
1356.	Havana	2d.	1416.	Athens	6d.
1357.	Paraguay	5d.	1417.	Söul	1½d.
1358.	Guayaquil	4½d.	1418.	Beyrout	1d.
1359.	Cadiz	1½d.	1419.	Berlin	1½d.
1360.	Marseilles	1½d.	1420.	Nice	3d.
1361.	Brest	1d.	1421.	Yokohama	1½d.
1362	Syra	2½d.	1422.	Maracaibo	1d.
1363.	Suakin	1d.	1423.	Tunis	1½d.

No. 1424.

Reference to previous Report, Annual Series No. 1320.

TURKEY.

BAGHDAD AND BUSSORAH.

Consul-General Mockler to the Earl of Kimberley.

My Lord, *Baghdad, May* 26, 1894.

I HAVE the honour to forward herewith Trade Reports of Bussorah and Baghdad for the year ending December 31, 1893.

As your Lordship is aware no statistics of exports or imports are procurable from the Turkish Custom-house authorities or administration of the Turkish line of steamers, and as the tabular statements of imports appended to the Baghdad Trade Reports of former years showed merely the amount and value of cargo imported by the two steamers of the Euphrates and Tigris Company, a great portion of which being manifested as "merchandise," merely, is therefore unclassifiable, and showed none of that imported by the Turkish line of steamers, while the tabular statements of exports showed only cargo exported by the Euphrates and Tigris Company and a few other shippers out of many, and as the amount (as to the value no idea can be formed) of cargo now carried by the Turkish steamers is probably, under the exceptionally able administration of Commodore Emin Bey in Bussorah, four or five times greater than it was some three years back, and certainly double (perhaps more) that carried by the two steamers of the Euphrates and Tigris Company, I have considered it best to omit such tabular statements from the present report as being valueless and probably misleading.

I have, &c.

(Signed) E. MOCKLER.

Reports on the Trade of Baghdad and Bussorah for the Year 1893.

ABSTRACT of Contents.

	Page
Baghdad—	
General	3
Exchange	3
Imperial Bank of Persia	3
Exports—	
Wheat	3
Wool	3
Mohair	4
Galls	4
Gum tragacanth	4
Liquorice-root	4
Dates	4
Carpets	4
Imports—	
Manchester goods	4
Continental goods	5
From British India	5
River communication	5
Bussorah—	
Shipping	6
State of river	6
Freight	6
Imports	6
Exports	6
Exchange	6
Public works	7
Health	7

General. The year ended December 31, 1893, was an unsatisfactory one for most British merchants in Baghdad; and during the last 3 or 4 months of the year, such may to a great extent be attributed to the depreciation of silver, during which time export trade was affected by the shrinkage of value of all commodities as expressed in gold, while the import trade being largely for Persian accounts liquidated in silver was carried on with difficulty and generally to the loss of those engaged in it. The Persian kran fell some 25 per cent. in value, so that goods which could be sold at 50 krans before had to fetch 67 krans to realise the same sterling value, and though, eventually, prices of goods in Persia will have to rise in proportion, the process can only be a gradual one. The fall in the kran was so rapid that merchants here sustained great losses in goods which they had sold in Persia on credit at apparently a profit, but which, when due, showed a very different result. Credit was much shaken, and it was feared that there would be many failures.

It is, however, a source for congratulation that the market stood the losses so well and that failures were comparatively few and insignificant. It has been stated to me that the constantly increasing number of native houses starting in Manchester is a serious drawback to legitimate business, for the reason that they trade beyond their means; and not having the capital to hold for any time are frequently compelled to either realise at ruinous prices or find some means of fixing the loss on the underwriters. The year closed with markets in a very unsettled condition.

Exchange on London was very steady all the year, having ranged between 113 Grand Segnior pias. to 115¼ Grand Segnior pias. per 1*l.* for 4 months' date bills. The Turkish lira and mejidie stood at 103½ Grand Segnior pias. and 19¼ Grand Segnior pias. respectively. Exchange.

Baghdad branch of this bank was closed on August 17, 1893, the Imperial Ottoman Bank taking over its business. Imperial Bank of Persia.

Exports.

Exports of this article were almost nil, in consequence of constantly declining prices in Europe and small supplies available for export from this Vilayet. Surplus stocks having been heavily drawn upon by the actual demand of 1891–92. At end of the year supplies from the new crop came in and a few shipments were made. The quality of the present crop is said to be inferior to that of last, the grain being coarse and overgrown owing to excess of water when ripening, and disliked by English millers. Wheat.

The clip was about, or perhaps somewhat less than, an average one in quantity and quality. Fresh arrivals were taken at high prices for American account or in anticipation of American orders, but in July, owing to the American carpet mills being, to a great extent, closed in consequence of financial difficulties in connection with "silver" legislation in the States, the demand entirely fell off, and at the end of the year the greater portion of the clip remained unsold in London and Marseilles markets, and I am told that for such amount as was sold, prices from 1*s.* 4*d.* to 1*s.* 2*d.* per lb. under those paid for it only were realised. To particularise as regards Arab wool, the season opened at 14*s.* 11*d.* to 15*s.* 1½*d.* per maund (about 34½ lbs.), but the competition was so fierce that later on prices went up to 16*s.* 3*d.*, the purchasers being confined to three or four native firms only. The market soon, however, fell to its former level, which was still too high to tempt English merchants, and consequently a very large quantity was held over. In Awass wool there was very little business done and only a very small quantity changed hands. The merchants in Mosul and Kerkook bought up everything at very high prices, and being unable to dispose of it in Baghdad had to send it forward on their own account. Mosul Awass wool was of very good quality and well washed, but the Kerkook wool of this description was inferior. The few parcels that were sold here realised from 14*s.* to 14*s.* 11*d.* per maund (about 34½ lbs.). In the Kurdish description there was a large trade done, especially that from Persian Kurdistan. From the neighbourhood of Kermanshah, 4,000 camel bales were imported, all of which were pressed and exported by the importers, with the exception of one parcel of about 150 bales which was sold at 13*s.* 9*d.* per maund (about 34½ lbs.). From Sulimania, Mosul, and Arbil the clip was good, but the first cost was so great that buyers who sent the wool into this market for sale only half washed it in order to Wool.

avoid loss in weight. The prices asked were in very few cases realised, and the bulk of the clip went forward on importers' account.

Mohair. Mohair was not in much demand in London, and consequently was very difficult of sale here at the commencement of the season, and later on was all exported by the owners.

Galls. A large stock came to market principally carried forward from 1892, and over 10,000 bags were shipped to London and Continental markets, principally to the former. Average price in the beginning of the year was about 12*l.* 5*s.* 7*d.* per cantar of 223 okes (about 640½ lbs.). The new season's crop which began to come forward in October was also sold at such price to commence with, but fell to 11*l.* 16*s.* 9*d.* before the close of the year, and greater part of the crop was still on hand at the end of the year owing probably to depression existing in French silks, for the dyeing of which this nut is largely used.

Gum tragacanth. The imports were very large and between 6,000 to 7,000 cases were shipped during the year principally to London, but owing to the absence of demand in the home markets not much business was done until the year was well advanced, and at the end of it some 400 or 500 cases remained unsold. This article comes from Kermanshah, Barna, Kurdistan, and Sulimania.

Liquorice-root. There are many enquiries for the low quality available in this country, but the trade might be made a valuable one were greater care bestowed on the drying and preparation of the root for shipment. It grows wild in many parts of the country on the banks of both the Tigris and Euphrates; and can be obtained at cost of the labour required to collect it.

Dates. The crop of dates was not very large but the quality was unusually good, and though there was very little demand for the English markets, unusually large quantities were at the commencement of the season exported to Syria, Egypt, and Constantinople. Business, however, in this article never lasts very long in Baghdad, as it is only the first of the new crop that is sent away.

Carpets. In Kurdish rugs and carpets there was a very large trade done for the London market, and there was also a brisk demand for Egypt and Constantinople, so that all that came in was readily disposed of.

Imports.

Manchester goods. The trade of the year has been much below an average one. The strike of the Lancashire mill hands in the winter of 1892 and spring of 1893, affected it adversely. This was no sooner over and prices in Manchester had fallen to a working basis, when in June cholera broke out in Bussorah, and the apprehension that it would spread north to Baghdad exercised a depressing effect. Cholera appeared in Baghdad at the end of August, and though the epidemic was less severe than that of 1889, it was sufficiently serious to cause the greater part of the well-to-do of the population to

leave the place and bring business to a stand-still. In October the disease had sensibly diminished and business was resumed, but its existence in the surrounding country and consequent quarantine restrictions prevented buyers from neighbouring towns and villages from visiting Baghdad, as is their custom in the autumn months, to lay in stock for cold weather requirements. The off-take from the bazaar was consequently comparatively a small one, and even the reduced supplies of Manchester goods ordered were found in excess of demand, and prices realised were generally unremunerative.

Baghdad's largest customers for cotton goods belong to Western Persia with the important centres of Kermanshah and Hamadan, but owing to the heavy fall in value of silver the trade with Persia was carried on with great difficulty and resulted in loss to those engaged in it, who risked the unknown in buying in gold in Baghdad and selling in silver in Persia.

Continental goods.

Baghdad is a large consumer of such manufactures as Lyon's silks and brocades, Swiss headkerchiefs and embroidered muslins, printed goods, fezes, crockery, glassware from Austria, and gold thread and cheap woollen and cotton goods from Germany. These articles were affected by the prevailing depression.

From British India.

In addition to considerable quantities of Bombay yarns, grey shirtings and T-cloths, the imports consisted of kerosene (nearly all Russian), sugar (from Mauritius), coffee, tea, spices and gunny bags. The trade in which articles is mostly in the hands of the natives.

River communication.

As heretofore, the two steamers of Messrs. Lynch and Co., and four old and nearly worn-out steamers belonging to the Oman Ottoman Administration Company, are still the only steamers plying on the Tigris, and are insufficient for the carrying trade. A low river and quarantine restrictions, owing to presence of cholera at Bussorah, seriously interfered with traffic and delivery and despatch of Indian mails for some months. During the year the formation of a company (native) under the auspices of the Civil List Department, which was to take over existing Oman Ottoman steamers, increase the fleet by the addition of new steamers, and establish steam communication between Baghdad and Mosul, was talked of; but scheme and company and new steamers are still "en l'air."

Bussorah.

Consul Beville reports as follows:—

Shipping. Fewer steamers came to Bussorah in the year under report owing to the unprofitableness of shipping grain.

In March the Euphrates and Tigris Steam Navigation Company commenced a regular service between Bussorah and Ahwaz on the River Karun, a steamer having been specially constructed for the purpose.

State of river. Quarantine against Bussorah having closed the river between the port and Baghdad, at a time when the river is best navigable, grain could not be brought down in native boats during that period, which lasted for about 3 months. River steamers also suffered considerably in their carrying trade owing to the same cause.

Freight. During the first quarter freights to London averaged 1*l.* 1*s.* During the second, third, and fourth quarters the average rates were 1*l.* 4*s.*, 1*l.* 12*s.*, and 1*l.* 7*s.* respectively.

The rates to Bombay were as in the previous year, though during the cholera epidemic, when trade was almost entirely suspended, nominal rates prevailed.

Imports. The trade is almost entirely in the hands of retail dealers, and local markets being overstocked there was little profitable business.

Exports: Dates. During the first part of the date season great uncertainty existed as to whether dates would be allowed into America owing to the existence of cholera in Bussorah. The previous year having been a good one, a larger number of cases for packing dates were imported, causing growers to demand too large a price for profitable dealing. London sales were considerably affected by the above causes, and packers therefore in many instances reduced their shipments. When the packing season ended, growers having large stocks unsold, caused prices to fall considerably, and hence the large export of dates in baskets.

Wheat. Low prices ruling in the home markets caused little wheat to be exported.

Barley. The price of this article has fluctuated considerably, and at times there was a considerable export, though at the latter portion of the year little was done. Bulk barley was loaded by shipping agents having steamers on their hands, as the cheapest article with which to load.

Other cereals. Shipments to India and Gulf ports have continued throughout the year, keeping prices, though low, at just too high a level for the home markets.

Horses. Larger numbers of horses were exported to India, where good prices were the rule.

Exchange. The following were the average monthly rates on London for 4 months' bills:—

Month.	Krans to the 1*l.*
January	38
February	$38\frac{5}{16}$
March	$38\frac{1}{4}$
April	$38\frac{3}{16}$
May	$37\frac{3}{4}$
June	$37\frac{2}{5}$
July	$37\frac{1}{4}$
August	37
September	37
October	37
November	$37\frac{1}{2}$
December	$37\frac{3}{4}$

Public works. The Government have constructed 3 posts on the river between Bussorah and Fao for the protection of river craft and sailing vessels, and also for the prevention of smuggling.

Health. During the months of May, June, July, and August cholera was prevalent in Bussorah and surrounding districts in epidemic form, and it is computed that 750 people died during those months from the effects of this disease.

Annex A.—Statement of Articles of Import into the Port of Bussorah during the Years 1892–93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Cotton	Cases	11,520	325,825	8,304	259,490
Silk	,,	70		68	
Wool	,,	1,443		2,668	
Coffee	Bags	5,615	18,385	2,359	16,763
Copper	Bundles	6,911	24,644	2,886	11,540
Coal	Tons	8,676	12,146	5,126	7,000
Candles	Cases	1,024	1,024	110	110
Charcoal	Packages	11,536	2,884	16,191	4,048
Dhall	Bags	353	214	264	159
Earthenware	Packages	1,443	2,886	782	1,564
Gunnies	Bundles	5,811	34,866	6,860	41,160
Gunthalr	Packages	472	2,360	784	3,920
Glassware	,,	3,338	13,014	299	897
Grinding stones	Number	14,547	1,453	15,021	1,502
Henna	Packages	2,417	3,626	3,492	5,238
Iron, steel bars, &c.	,,	27,325	27,325	6,432	6,432
,, hoops	,,	6,589	6,589	8,320	8,320
Indigo	Cases	28	700	46	1,150
Kerosene oil	,,	57,993	14,498	37,661	9,415
Liquors	,,	2,284	3,426	2,162	3,243
Leather	Bales	110	880	226	1,808
Lead	Slabs	2,232	1,116	2,075	1,038
Tin	Sheets	1,906	953		
Medicines and drugs	Packages	331	993	618	1,854
Matches	Cases	817	3,268	1,173	4,692
Limes and lime juice	Bags and carboys	783	783	204	204
Nails	Cases	1,707	2,560	603	805
Rice	Bags	4,390	2,195	10,840	5,420
Rope and twine	Bundles	4,785	4,785	5,262	5,262
Rosewater	Carboys	1,083	433	911	364
Sugar—					
Loaf	Cases	36,746	73,492	21,844	43,688
Crushed	Bags	17,074	25,611	31,150	46,725
Spices	Packages	12,410	24,820	9,057	18,114
Tamarinds	,,	8,803	5,281	6,285	3,771
Tea	Cases	1,078	3,234	1,258	3,774
Wood, poles, &c.	Number	64,137	6,414	117,451	14,069
,, planks	,,	89,462	13,419		
,, date boxes	Bundles	85,749	34,300	110,410	44,164
Alum	Packages	510	1,020		
Gold thread	Cases	3	180		
Preserves	Packages	203	609		
Raw cotton and twist	Bundles	1,604	16,040	21,336	106,680
Soap	Cases	731	3,655		
Tobacco	Packages	1,121	3,923		
Sundries	,,	23,091	115,398		
Total	...	...	838,737	...	684,427

Annex B.—STATEMENT of Articles of Export from the Port of Bussorah during the Years 1892–93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Barley	Bags ...	114,740	28,685	117,706	14,712
,, (bulk)	Cwts. ...	475,330	95,066	633,130	63,313
Carpets	Bales ...	483	9,660	315	6,300
Dates	Boxes ...	566,436	169,930	544,391	136,098
,, ...	Baskets and skins ...	565,530	141,382	644,638	161,159
Young date trees	Packages...	406	25	...	...
Date seeds	,, ...	45	23	...	...
Drugs	,, ...	116	450	380	1,520
Edra	Bags ...	68,809	30,990	70,547	14,109
Gum	Packages...	2,915	20,405	5,109	35,763
Gall-nuts	Bags ...	3,833	15,332	5,004	20,020
Ghee	Cases ...	21,726	38,019	3,057	4,586
Hair and mohair	Bales ...	536	7,370	...	...
Hides and skins	,, ...	3,206	12,832	1,868	7,460
Horses	Number ...	2,268	37,504	3,432	50,480
Liquorice root	Bales ...	4,919	9,838	11,332	22,664
Opium	Cases ...	12	1,200	41	4,100
Rice	Bags ...	142,256	56,890	48,911	13,050
Paddy (bulk)	Tons ...	2,813	8,353	...	...
,, ...	Bags ...	23,721	5,880	58,367	6,000
Raisins...	,, ...	350	900	150	400
Seeds	,, ...	51,220	18,848	93,722	9,400
Sesame seeds	,, ...	9,068	6,293	28,139	18,700
Silk	Bales ...	23	690	10	300
Wheat	Bags ...	324,120	160,000	182,187	45,548
Wool	Bales ...	27,705	221,640	13,606	120,000
Almonds	Bags ...	107	430	1,920	9,600
Sundries	Packages...	3,136	15,680		
Total	...	...	1,114,315	...	765,282

Annex C.—RETURN of all Shipping at the Port of Bussorah during the Year 1893.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	97	10,954	108	115,577	205	126,531
Arabian and Turkish	302	10,757	2	2,760	304	13,517
Persian	256	14,457	...	...	256	14,457
Norwegian	...	...	2	2,632	2	2,632
German	...	...	1	822	1	822
French	4	602	1	184	5	786
Zanzibar	1	60	...	...	1	60
Total	660	36,830	114	121,975	774	158,805

Annex D.—STATEMENT of Steamers which Visited the Port of Bussorah during the Year 1893.

Nationality.	Number of Steamers.	Whence Coming.	Whither Bound.	Tons.
British	23	United Kingdom..	London	35,529
	79	Bombay	Bombay	72,372
	1	London	New York.. ..	1,067
	1	New York.. ..	London .. .	1,067
	1	Amsterdam ..	London	1,786
	2	United Kingdom..	Jedda	2,646
	1	Jedda	Jedda . ..	1,110
Total ..	108	.	..	115,577
Norwegian ..	2	United Kingdom..	London	2,632
German ..	1	Singapore . ..	Singapore.. ..	822
Turkish ..	2	Constantinople ..	Constantinople ..	2,760
French ..	1	Persian Gulf ports	Persian Gulf ports	184
Grand total	114	..	..	121,975

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Nº 1426.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE AND FINANCE.

TURKEY.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF THE CONSULAR DISTRICT OF ERZEROUM.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1242.

Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.

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1347.	Algiers	3d.	1407.	Pakhoi	1½d.
1348.	Amapala	½d.	1408.	Hankow	1d.
1349.	Cherbourg	1d.	1409.	Amsterdam	1d
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1353.	Trieste	3½d.	1413.	Swatow	1d.
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1357.	Paraguay	5d.	1417	Soul	1½d.
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1359.	Cadiz	1½d.	1419	Berlin	1½d.
1360.	Marseilles	1½d.	1420	Nice	3d.
1361.	Brest	1d.	1421	Yokohama	1½d.
1362.	Syra	2½d	1422	Maracaibo	1d.
1363.	Suakin	1d.	1423	Tunis	1½d.
1364.	Callao	1d.	1424.	Baghdad and Bussorah	1d
1365.	Piræus	2d.	1425	Rio Grande do Sul	7d.

No. 1426.

Reference to previous Report, Annual Series No. 1242.

TURKEY.

ERZEROUM.

Consul Graves to the Earl of Kimberley.

My Lord, *Erzeroum, June* 8, 1894.

I HAVE the honour to transmit herewith a Report on the Trade of Erzeroum for the year 1893, together with Reports on the Trade of Van and Diarbekir by Mr. Devey and Mr. Boyajian.

I have, &c.

(Signed) R. W. GRAVES.

Report on the Trade and Commerce of Erzeroum for the Year 1893.

ABSTRACT of Contents.

	PAGE.
Erzeroum—	
Exports	2
Imports	2
Agricultural machinery	3
Mines	3
Debt	3
Tobacco monopoly	3
Persian transit trade	4
Van report	7
Diarbekir report	9

Far from showing any signs of recovery from the serious falling-off reported by Acting-Consul Fitzmaurice in last year's report (No. 1242, Annual Series), the trade of Erzeroum in 1893 has continued to decline, the very low figure for imports during 1892 being barely maintained, while the exports have diminished by 44,600*l.*

Years.	Value.	
	Exports.	Imports.
	£	£
1893	164,700	231,690
1892	209,300	230,015

Export trade.

The bulk of this decrease is explained by the total cessation of the grain export, amounting to 25,000*l.* in 1892, most of which was taken by the neighbouring Russian provinces, and by the smaller amount of linseed exported, to a value of 5,000*l.*, in lieu of 18,000*l.*

The harvest of 1893 was not a specially bad one, the yield in proportion to the amount sown being almost an average one; but for a variety of causes, mainly due to inefficient administration—amongst which must be enumerated the increasing lawlessness of the Kurds in outlying districts, the absence of credit, the want of communication, and the emigration of a large body of industrious Armenian cultivators—a great deal of land had fallen out of cultivation; stocks had fallen very low owing to the failure of the harvest of 1892, and the agricultural population, largely indebted as they are to usurers, who themselves speculate in grain, were obliged to hand over a great part of what they reaped in repayment of usurious loans, or of advances from the agricultural banks, so that not only did nothing remain over for export, but they were in numerous instances left to face the winter without sufficient grain for food and seed. In the meanwhile the local speculators, having "cornered" all the breadstuffs in the province, gradually forced the prices up to about three times the normal rate, and the result has been an artificial famine affecting the whole province. In the town of Erzeroum, out of a population of 40,000, over 10,000 have been dependent upon charity during the past winter, and I believe the proportion of destitute persons in the country districts to be equally high. Of these it may be said that their starving condition is due, not to the absence of sufficient food in the country, but to their inability to pay the prices asked by the monopolists.

Import trade.

Under these circumstances it is not surprising that the purchasing power of a district where agriculture is practically the sole industry has been reduced to the lowest ebb, and the business in import goods showed no recovery from the miserable results of

1892. Other unfavourable influences which had contributed to reduce this trade by the considerable sum of over 64,000*l.* in 1892 as compared with 1891 were still maintained. A fresh outbreak of cholera at Trebizond in the autumn almost entirely closed that port to foreign shipping for some months; and the dangers and difficulties of the roads, and the uneasy feeling which just now affects the Turkish Armenians generally, helped further to discourage all kinds of commercial enterprise.

British imports. British imports, which had fallen from 61,800*l.* in 1891 to 49,250*l.* in 1892, still further declined to 47,400*l.*, and there is little prospect of present improvement in the trade, as I am assured by importers of Manchester goods—by far the largest item of our trade here—that there is little or no demand from outlying customers in the smaller towns, who draw their supplies from Erzeroum, and considerable stocks remain over from past years.

Agricultural machinery. An effort is being made to encourage the use of agricultural machinery. The ploughs and drill ploughs especially of the model farm at Ilidja have been in greater demand than in previous years by neighbouring farmers, and some implements of this class, imported by a local landowner from Lyons, have given very satisfactory results. In case there should be any development of this trade, it should be borne in mind that for this market such machinery should be light and portable, owing to the difficulty of transport and the small size of the native horses and cattle, as well as simple and solid in construction, on account of the want of skilled workmen to work or repair them.

Mines, &c. Nothing has been attempted with respect to working the deposits of coal or other mineral resources of the country. A communication from the Ministry of the Interior was published in the official newspaper of the vilayet to the effect that, concessions having been demanded for the working of coal mines in this vilayet, and refused on the ground that the applicants were foreigners, the Governor-General should endeavour to find suitable persons to undertake this enterprise among the natives of the country. This is regarded as an indirect way of shelving the question, as it is believed that no such persons are likely to present themselves. In the meanwhile the destruction for firing of such natural wood as remains goes on unchecked, and the villagers continue to burn as fuel the animal manure, which is so badly needed to enrich an impoverished soil.

Ottoman Public Debt Administration. The income from the revenues ceded to the Administration of the Public Debt shows a slight falling-off from the preceding years, being about 43,000*l.*T for 1893, as against over 47,000*l.*T for 1892. This decrease is more than accounted for by the diminution in the sales of salt by about 5,000*l.*T caused by the growing poverty of the population.

Tobacco monopoly. The Tobacco Régie has, I understand, increased its sales by nearly one-third in 1893, chiefly owing to greater attention to the repression of smuggling from the coast, but the local director says

that he is not able to furnish me with figures in support of this statement.

Persian trade transit.

The Persian trade, both direct and transit, has been unfavourably affected by the quarantine established in consequence of cholera at Trebizond; but this business only indirectly regards Erzeroum in so far as the money spent in the province by passing caravans is concerned, and is, moreover, dealt with in the reports of Her Majesty's Consul at Trebizond, where fuller details are obtainable.

Annexed are tables of statistics, marked A to E, of which it must be remarked that they are only approximative and based upon private inquiry, no official statistics being procurable.

Annex A.—RETURN of Principal Articles of Export from Erzeroum during the Years 1893–92.

Articles.	1893.		1892.	
	Value.	Total.	Value.	Total.
	£	£	£	£
To foreign countries—				
Wheat	..		25,000	
Linseed	5,000		18,000	
Hides and skins ..	12,000		17,500	
Furs	9,750		9,200	
Other articles	1,550		2,000	
		28,300		71,700
To Turkish provinces—				
Wheat	..		8,000	
Sheep	95,000		80,000	
Oxen and cows	25,000		30,000	
Horses	3,000		3,500	
Pasdirma	10,000		12,500	
Other articles	3,400		3,600	
		136,400		137,600
Grand total ..	..	164,700	..	209,300

Annex B.—RETURN of Principal Articles Imported to Erzeroum during the Years 1893–92.

Articles.	1893.		1892.	
	Value.	Total.	Value.	Total.
	£	£	£	£
From foreign countries—				
Sugar	21,500		20,300	
Coffee	3,600		4,000	
Iron	4,500		5,500	
Copper	3,500		3,000	
Calico	15,000		15,000	
Prints	6,000		7,000	
Other Manchester goods	8,900		8,800	
Woollen and linen ..	13,750		15,800	
Leather	4,000		5,000	
Petroleum	4,500		5,000	
Oxen	2,500		2,250	
Sheep	7,000		7,500	
Other articles	56,200		48,850	
		150,950		148,000
From Turkish provinces—				
Manoussa	13,300		14,750	
Dried fruits	2,350		1,600	
Riza linen	1,000		900	
Goatskins	2,250		2,350	
Galls	2,000		2,250	
Furs	7,650		6,350	
Other articles	15,870		17,015	
Persian goods	36,320		36,300	
		80,740		82,015
Grand total ..	..	231,690	..	230,015

Annex C.—TABLE showing Total Value of all Articles Exported from and Imported to Erzeroum to and from Foreign Countries during the Years 1893–22.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	..	..	47,400	49,250
Turkish provinces ..	136,400	133,600	44,420	45,715
France	17,000	35,500	29,350	29,200
Austria	1,050	1,000	33,900	37,600
Russia	9,750	34,200	32,700	27,750
Switzerland	..	..	3,800	4,200
Persia	..	..	36,320	36,300
Other countries ..	500	..	3,800	..
Total	164,700	209,300	231,690	230,015

Annex D.—RETURN of Imports from Great Britain during the Years 1893–92.

Articles.	Value.	
	1893.	1892.
	£	£
Tea	3,400	3,600
Pepper	300	250
Iron..	4,500	5,500
Copper	3,500	3,000
Pewter	200	250
Cochineal	350	400
Indigo	300	250
Calicoes	15,000	15,000
Cloth	2,000	2,500
Prints	6,000	7,000
Turkey-red	400	400
Flannel	100	100
Cotton flannel	1,000	1,500
Muslin	1,300	1,300
Drill	100	200
Sewing thread	5,000	4,000
Lining	250	300
Handkerchiefs	1,000	1,000
Tin	1,200	1,400
„ sheet	300	300
Sundries	1,200	1,000
Total	47,400	49,250

Annex E.—RETURN of Imports from Russia during the Years 1893–92.

Articles.	Value.	
	1893.	1892.
	£	£
Buffalo skins	7,000	1,500
Petroleum	4,500	5,000
Silk	100	50
Yamtchis	300	150
Rice..	4,000	3,500
Oxen	2,500	2,250
Silver wire	..	..
Spirits of wine	1,500	1,800
Sheep	7,000	7,500
Sugar	..	..
Sundries	2,000	3,000
Prints and flannel	3,800	3,000
Total	32,700	27,750

VAN.

Mr. Vice-Consul Devey reports as follows:—

Table I.—LIST of all Articles Imported to and Exported from the Vilayet of Van during the Years 1893–92.

IMPORTS.

Articles.	Value.	
	1893.	1892.
	£	£
Raw cotton	4,500	4,550
Cotton prints	26,600	19,150
Woollens	37,400	29,500
Fezzes	2,250	1,280
Linens and calicoes	21,000	10,600
Silks	8,000	5,650
Manoussa	7,270	6,900
Cotton twists	1,550	1,140
Metals	9,700	7,600
Colonials	9,400	6,000
Rice	2,300	1,600
Dried fruits	5,000	3,800
Petroleum	3,200	2,700
Glass and hardware	2,100	900
Leather	2,750	2,000
Stationery	450	500
Sundries	39,740	44,060
Total	183,210	147,930

EXPORTS.

Articles.	Value.	
	1893.	1892.
	£	£
Sheep	27,270	27,270
Mohair	2,200	550
Wool	2,730	2,730
Sheep and goat-skins	3,640	3,640
Lamb-skins	270	450
Wheat	5,500	7,270
Kilims (wool and felt rugs)	2,100	2,050
Buffalo-skins	1,100	1,630
Loupes (walnut-wood)	2,280	2,280
Live stock	1,500	5,500
Woollen stuffs and articles of clothing	13,200	13,200
Dried fish	1,750	900
Silver-work objects	7,000	7,000
Tobacco	11,500	8,000
Furs	900	1,050
Sundries	3,640	125
Total	86,580	83,645

TABLE II.—Showing Total Value of all Articles Exported from and Imported to the Vilayet of Van from and to Foreign Countries during the Years 1893-92.

Country.	1893.		1892.	
	Imports.	Exports.	Imports.	Exports.
	£	£	£	£
Great Britain and India	69,630	..	58,000	..
France	41,220	10,000	23,700	12,200
Austria	28,630	..	26,000	..
Russia	5,200	..	4,500	..
Persia	19,200	10,000	8,000	1,000
China	1,350	..	..	..
Other parts of Turkey..	25,980	66,580	27,730	69,495
Total	183,210	86,580	147,930	88,645

The trade of 1893 shows a satisfactory total, there being a considerable increase in the imports, and the exports having a slightly larger value than in 1892.

But though commerce in the imports and exports is improving slowly and steadily, the material prosperity of the district would appear to be nearly stationary. There is no development of the means of transport; roads or tracks are in much the same state as they have ever been; and there is no expectation of utilising the lake for water transport, as has been so often proposed. The cost of transport between Erzeroum and Van is in ordinary times about 5*s.* per cwt., but owing to the partial failure of harvests in neighbouring districts it has lately risen to about 12*s.*, and the past winter has been abnormally severe. Money is hardly more plentiful than at any time since the late war, although there has now been ample time for the country to recover; and there is now much less of temporary emigration or moving to Constantinople for the purpose of earning a small competence than formerly. No bank or factory exists or seems likely to exist; and mines are unknown. Two ways only of acquiring wealth seem to be recognised, viz., lending money at usurious interest, and storing grain in the hopes of a famine or of forcing the price. A commission is now sitting to inquire into the usurious interest question, and I will only mention that it is not unusual for an agricultural borrower to have to repay ten times the original loan. This part of Asia may still be likened to the less civilised regions of Europe in the middle ages under most aspects.

Imports.

The chief items of importation are woollens, cotton prints linens and calicoes, all of which were imported to a much larger extent than last year. It is also to be expected that the demand

will continue increasing, as the cheapness and superiority of the foreign manufactured article becomes ever more widely known. Native industries continue to languish, and the import of raw cotton from Persia was not greater than in the previous year. The demand for silks, metals and colonials was again remarkably active, though the value of the two latter items was scarcely above the average.

No new article figures in the list, and this year again there was no importation of live-stock.

Exports.

Sheep. The value is given as the same as it was last year, but the estimated number rose from 50,000 to 60,000. This number is still below the computed average of 80,000 to 100,000, in good years, showing that the severity of the sheep disease of 2 years ago is yet felt. 5 years ago some 90,000 head were exported at about 11*s.*, mostly to be sold again at Aleppo for 13*s.* 6*d.* The reason for the present diminution in price is that less 3-year-olds were exported; the full grown animal still fetches here 12*s.*, but the average value on the total number exported would be about 9*s.* or a trifle more per head.

Little else in this list calls for any remark. Less wheat was sent to neighbouring vilayets than in 1892, and proved to be ill-spared. The coarse quality of native grown tobacco was rather more largely exported into Persia. The trade in native manufactured articles, of silver work, carpets, and the woollen stuffs of Shattakh, have kept their place. As live-stock is no longer brought into the province for re-exportation, the value sent out was less.

British imports again increased sensibly, the chief items being linens and calicoes, prints, and metals. Other European nations can hardly compete with England in these matters, but our woollens find small market, in consequence of their high quality and consequent dearness, and perhaps of being unsuited to local taste. From France an unusually high value was received, silks, woollens, colonials, and sundries contributing most; but the increase in Austrian imports is less than might have been anticipated. Persia more than doubled her last year's imports, but is still far from regaining her lost commerce; the exports from Van to Persia are chiefly tobacco and articles of food. Tea is imported directly from China.

DIARBEKIR.

Mr. Vice-Consul Boyajian reports as follows:—

Condition of trade. The condition of trade, notwithstanding the fluctuation in the value of silver money, may decidedly be considered good. Taking together export and import there was an increase of 23,445*l.*, or nearly 7 per cent.

Home trade. There will be noticed an augmentation amounting to more than 7 per cent. in the trade with the other provinces of the Empire. This was due to a larger quantity of provisions having been exported to the neighbouring famine-stricken provinces.

Export. Export to foreign countries increased more than 10 per cent., that to England alone more than 46 per cent. over the year 1892.

Wool. An increase of 10 per cent. in volume and 15 per cent. in value will be noticed in the wool, caused by a larger demand. All was, as in former years, exported to England.

Mohair. There was a falling-off in the volume of mohair nearly 20 per cent., owing to a large number of goats having died last year, but for the same reason it fetched more than 25 per cent. higher price.

Skins (goat). The volume of goat-skins was slightly over the previous year, but the larger part of it was consumed in the country, and the rest exported as usual to France.

Nut-galls. Nut-galls increased 20 per cent. in volume and in value, owing to a better crop and larger demand.

Gums. The volume of gums exported was more than 10 per cent. over the year before, but the value about 50 per cent. This is to be attributed to a greater demand.

Butter. The falling-off of 11 per cent. in volume in the exportation of butter will be noticed, which was caused by the perishing of a large number of cattle, which also occasioned a rise in the price about 9 per cent.

Wheat. The value of wheat exported was almost doubled. This was entirely due to the dearth which is raging in the vilayets of Erzeroum and Bitlis, and in a degree in that of Kharput.

Import. The increase of foreign import was only 3 per cent., but there was a falling-off in the value of imports from England more than 4 per cent.

Cotton twists. The volume of cotton twists imported was the same as the previous year with 2·5 per cent. reduction in price.

Longcloth and prints. Longcloth both in volume and value was stationary, but in the exportation of prints there was 15 per cent. increase in value. This is to be attributed to an article, named here Bazen, lately imported from Germany.

Coffee. A slight increase in the value of coffee will be noticed, which was due to a higher price averaging 10 per cent.

Woollens. In the volume of woollens imported, partly from France, and

Petroleum. partly from Germany and Austria, there will be noticed an increase of about 30 per cent.

The increase in the value of petroleum exported during the year is due to the higher price of transportation in the interior of the country.

Sundries. Among other items the following may be mentioned. Tin in bars, imported from England, decreased 25 per cent., owing to a reduced price. Dyes (Germany) more than 6 per cent. Iron bars, partly from Russia, but mostly from Sweden, augmented fully 50 per cent. There was a slight increase in the value of leather imported from France. Cotton flannel from England and Germany decreased 75 per cent. All the other articles mentioned in the annexed table of import were the same as the previous year.

I have only to state that the annexed Table A will show the volume and value of the articles of export and import, and the Table B of all articles exported from and imported to the province of Diarbekir from and to foreign countries during the years 1893–92.

Annex A.—RETURN of Principal Articles of Export from the Vilayet of Diarbekir during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Foreign—					
Wool	Bales ..	12,552	56,670	11,375	49,290
Mohair	„ ..	680	5,990	848	6,240
Nut galls	Tons ..	360	11,640	300	9,700
Gums	„ ..	24	2,640	22	1,763
Skins, goat	Dozens ..	1,250	1,360	1,404	1,584
„ kid	„ ..	1,832	1,253	1,666	1,196
Guts..	„ ..	900	..	..	800
Cocoons and rough silk	Lbs. ..	26,180	775	..	400
Furs..	..	..	2,400	..	2,200
Almonds	Cwts. ..	600	1,520	600	1,520
Sundries	..	..	600	..	600
Total	..	..	84,848	..	75,293
Turkey—					
Sheep and goats ..	Number..	50,000	26,000	50,000	25,000
Butter	Cwts. ..	7,000	17,040	7,800	15,600
Cattle, oxen ..	..	..	300	..	1,200
Copper ore	Tons ..	540	9,240	540	9,240
Rice..	„ ..	833	13,000	833	12,820
Silk and cotton stuffs	..	..	13,000	..	14,000
Skins, goat	Number..	1,834	2,010	1,634	1,810
Timbers	..	..	1,000	..	3,000
Wheat	..	..	20,000	..	10,000
Sundries	..	..	7,000	..	7,500
Grand total ..	..	..	193,488	..	175,463

RETURN of Principal Articles of Import to the Vilayet of Diarbekir during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Foreign—					
Cotton twists ..	Bales ..	3,360	45,435	3,800	46,597
Longcloths	,, ..	735	12,700	735	12,700
Prints ..	,, ..	180	4,510	160	3,160
Tin, in bars ..	Casks ..	130	2,250	133	2,300
Indigo	Cases ..	70	4,000	70	4,000
Hides, buffalo ..	Cwts. ..	750	2,820	780	2,820
Petroleum	Cases ..	22,000	8,920	22,000	8,150
Coffee	Bags ..	1,200	8,200	1,200	7,474
Sugar	Cases ..	2,700	7,200	2,700	7,200
Woollens	..	..	8,000	..	7,000
Matches	Cases ..	1,320	2,000	1,200	2,000
Papers	,, ..	350	2,000	350	2,000
Leather	..	..	2,200	..	2,100
Fezzes	Cases ..	50	1,900	50	1,900
Nails	Casks ..	800	2,000	800	2,000
Dyes	..	..	1,500	..	1,600
Iron bars	Tons ..	120	2,000	60	1,000
Copper, sheet ..	,, ..	30	2,500	25	1,924
Handkerchiefs ..	Cases ..	18	650	18	650
Cotton flannels ..	..	..	500	..	2,000
Jewellery	..	..	1,000	..	1,000
Persian goods ..	..	..	2,200	..	2,000
Sundries	..	..	14,000	..	12,000
Total	..	..	138,185	..	134,215
Turkey—					
Soap	Tons ..	250	5,400	250	5,400
Mamsa	..	..	4,000	..	4,000
Sheep	..	..	7,000	..	6,800
Salt	..	..	9,000	..	9,000
Sundries	..	..	6,000	..	5,000
Grand total ..	..	..	169,885	..	164,415

Annex B.—TABLE showing Total Value of all Articles Exported from and Imported to the Vilayet of Diarbekir from and to Foreign Countries during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
England	62,660	42,940	65,395	68,321
France	17,668	9,463	19,600	17,474
Russia	2,400	2,200	10,240	8,150
Germany	900	800	6,500	4,600
United States	..	19,290	..	..
Austria	..	..	10,700	13,200
India	..	..	6,000	6,820
Switzerland	..	..	1,850	650
Sweden	..	..	1,500	1,000
Persia	..	..	2,200	2,000
Different	1,220	600	14,500	12,000
Total	84,848	75,293	138,485	134,215
Turkey	108,590	100,170	31,400	30,200
Grand total ..	193,438	175,463	169,885	164,415

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1894.

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No. 1451.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE AND FINANCE.

TURKEY.

REPORT FOR THE YEAR 1893

ON THE

TRADE, &c., OF THE CONSULAR DISTRICT OF JEDDAH.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1264.

Presented to both Houses of Parliament by Command of Her Majesty, AUGUST, 1894.

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1385.	Buenos Ayres	5½d	1446.	Rotterdam	1d.
1386.	Caracas	1½d.	1447.	Port Said	1d.
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TURKEY.

JEDDAH.

Consul Richards to the Earl of Kimberley.

My Lord, *Jeddah, June* 23, 1894.

I HAVE the honour to transmit herewith to your Lordship my Trade Report for the year 1893 as well as that of Mr. Vice-Consul Ahmed.

I have, &c.
(Signed) W. S. RICHARDS.

Report on the Trade and Commerce of the Consular District of Jeddah for the Year 1893.

ABSTRACT of Contents.

	PAGE
Jeddah—	
General review of Jeddah trade	2
Indian imports	3
European imports	4
Exports	6
Shipping	7
Pilgrim traffic	8
Agriculture	9
Public works	9
Return of general import trade	10
,, import trade with British India	10
,, general export trade	11
,, all shipping	12
,, pilgrim traffic	12
Hodeidah—	
Shipping and navigation	12
Exports	13
Imports	13
Agriculture	15
Population	16
Industry	17
Public works, &c.	17
General remarks	17

General Review of Trade.

So far as I can gather from previous reports, trade generally last year appears to have been of a normal description, at all events in so far as the total value of the imports is concerned, and indeed that is what one really means when one speaks or writes of trade in the Hejaz; for the export trade is so insignificant, and for reasons which will be explained later on, this insignificance becomes every year so much more marked that it will soon be hardly necessary to take it into account.

As I mentioned in my report for the year 1892, the import trade of this province may be considered under two headings, viz., that of which the source is British India (in which term I include the Straits Settlements and Mauritius), and that which comes from various other parts of the world, although in reality Turkey, Persia, and Egypt are the countries which supply most of the goods so catalogued.

The Indian import trade, which is certainly the more important and the more valuable of the two, has increased somewhat both in volume and value, but not to any very marked extent, while the imports from other countries show only a slight improvement on those of the recent years.

It would be as well to state here that many goods which are imported into the Hejaz from India are so distinctly of purely British manufacture that the question is naturally asked at first why they are not imported direct from the country of origin. The chief reason is the extraordinarily high rate of freights for goods carried from England (say London and Liverpool) to Jeddah as compared with the extremely low freights asked for the carriage of the same goods from London to Bombay and from the latter port to Jeddah. It is, in fact, strange as it may seem, cheaper to take goods out the whole way to Bombay and bring them back again to Jeddah than to have them shipped direct from London to this port. The word "direct" is not correctly used in this connection, because very few goods indeed are imported direct from England. They are either transhipped at Port Said or Suez and then brought on here in one of the Khedivieh mail boats, or, more usually, taken on to Aden, transhipped there into a Khedivieh, or, occasionally, a British steamer coming up north, and so brought back to Jeddah. The consequence is that it pays better to import such essentially British goods as cotton goods (of various kinds), iron (bars, rods and nails), copper, tin, pewter, window-glass, &c., from India than from England. I am informed that when pilgrims bound for Mecca are plentiful at Bombay, ridiculously low freights are sometimes accepted by shipowners for goods which are wanted, if for no other purpose, as ballast. It should also be remembered that with the exception of cotton goods, the demand for such articles as those enumerated above, in a country like Arabia, is necessarily very limited, and consequently little or no discount

can be obtained from London dealers, whereas comparatively favourable terms are obtainable from wholesale firms in India.

On the whole the import trade of this province may be held to be in a satisfactory condition, more especially when we take into consideration the sparseness of its population, the poverty of the majority of the inhabitants, and their rude uncivilised life with its simple needs and consequent ignorance of much that is considered absolutely necessary for comfort in other and more favoured lands.

Indian Imports.

Rice is, as might be supposed, the principal article of importation from India, and indeed, in point of value it represents considerably more than one-third of the total value of the whole Indian import trade. In this article there has been a steady improvement on the amount imported in 1892. Rice.

Considerably less wheat, flour, and maize were imported into this country from India last year than in the preceding year, the reason being, at all events in the case of wheat and flour, the very high prices ruling in the Bombay market for those articles during that period. On the other hand, barley, chickpeas, and lentils were imported last year from India, though it is true in small quantities, whereas in 1892 there was no such importation from that country. The prices of the best Bombay wheat and flour in Jeddah during the greater part of last year were unusually high, wheat being sold at 25*s.* 3*d.* the quarter, while the average price of the best flour was as much as 33*s.* 9*d.* per quarter. Busrah wheat competes with that coming from Bombay, and owing to the high price of the latter article last year very successfully, although Indian wheat is, as a rule, a very superior product to that which comes from Busrah. It should be noted that Egyptian chickpeas and lentils are much superior to those which are imported from India. Very much less grain was imported last year from Egypt than usual. Cereals.

This class of goods, which after rice and cereals generally forms one of the chief articles of importation from India, shows a slight improvement on the previous year's return in the matter of value, though in quality it rather falls behind the total as given for that year. Considerably more cotton goods are imported into this country from India than from England, and as might be supposed, it entirely depends on the nature of the article imported whether it is sought for in the market of Bombay or in that of Manchester. Cotton goods.

The following are some of the chief varieties of cotton goods imported from India:—

Long-cloth (considerable quantity), unwashed, is dyed here and sold to the Bedoweens who make it up into shirts.

Long-cloth, washed (small quantity).

Mull (a good deal).

Long-cloth (another kind) made in England and dyed in Bombay.

Garamsoot, mixture of cotton and silk, made in Surat (considerable amount).

Melayah (whole silk), used by native women for covering the entire figure (not very much).

Melayah (another kind), large admixture of cotton (not very much).

Sharkiyah, made entirely of cotton, and dyed in red and white stripes (considerable quantity), used by the Bedoween for their turbans and kamarbands.

Long-cloth (another kind) resembles chintz in appearance, much used by the Bedoween as a covering for a sleeping couch.

Dacca cloth (not very much) and silk (from China), flowered as well as plain.

Sugar. There was a steady rise in the amount of sugar imported last year which, though shipped at Bombay, is a product of the island of Mauritius. This sugar which is powdered and is of a yellowish hue is, of course, cheaper than that which is imported from Trieste, Marseilles, or Egypt, and is used mostly for cooking purposes, and for the making of syrups and sweetmeats. There is also a small quantity of an exactly similar kind of sugar which is imported through Bombay from China; this is somewhat dearer than the former.

Coffee. There was a very considerable falling-off in the amount of coffee imported from India last year as, indeed, in that imported from the Yemen. Indian coffee is, of course, cheaper than that which comes from the Yemen (known as Mocha), and it is needless to state, much inferior.

Tea. In the tea import trade too there was some slackness last year. Indian tea (as a matter of fact it is mostly from China or Java) is, comparatively speaking, in considerable demand, the Arabs being great tea drinkers.

Pepper. In this article there was a very considerable improvement last year; in fact the quantity imported was more than double that of the preceding year. I have not been able to ascertain the reason of this.

Ginger. The quantity of ginger imported last year was about the average.

Timber. There was a slight improvement in this article which, though classed as of Indian origin, comes in reality from Java. It is imported in the form either of planks or beams, and is used almost exclusively in Jeddah for building purposes. The wood is known here as Java wood.

European Imports.

As mentioned above, this heading is somewhat of a misnomer, because in reality, with the exception of cotton goods, which are imported mostly from England, tin-plates which have the same

origin, white deal planks which are imported from Trieste, and sugar which comes partly from Trieste and partly from Marseilles, these goods have Turkey, Persia, and Egypt for their countries of origin

Here, as with the Indian imports, grain of various kinds occupies, though not actually the place of honour, which is taken up by cotton goods, at all events, the second place in point of importance in the list. Grain

The total amount of grain imported last year from Busrah, the Yemen and Egypt was neither more nor less than the average of recent years. Egypt contributed rather less than her usual share perhaps, the deficit being made up by Busrah importations.

Busrah wheat is cheaper than the Indian product, to which it is also distinctly inferior; but last year the difference between the average prices of the products of the respective countries was not so great as usual. Wheat.

On the other hand Egyptian chickpeas and lentils are much superior to those imported from India, and are consequently considerably dearer. Chickpeas and lentils.

Beans (broad) are imported solely from Egypt. Beans.

There was a very marked improvement last year in the total value of this class of imports, in fact, it was more than double that of the preceding year. This may, to a certain extent, be accounted for by the fact that last year there was considerably more than double the usual number of pilgrims to Mecca and Medina, and it will easily be understood that the more the pilgrims the brisker trade is generally. These goods consist mostly of madapolams, long-cloth, and white shirtings. Cotton goods.

There is a yearly increasing importation of cotton goods from Egypt and Syria. They are mostly cheap coloured prints made up by the native women so as to form various parts of their dress, while a few of them are used for the covering of divans, sofas, &c. Egyptian and Syrian goods.

Carpets and rugs are imported entirely from Persia, the number which reached Jeddah last year being rather below the average. Carpets.

Of tombac, or the tobacco which is exclusively smoked in narghilés (water pipes), there was last year such an enormously diminished importation as compared with that of the preceding year that one would be inclined at first to suppose that there is a mistake. But the fact is, the Régie, or Société de Tombac as it is more properly called, was only regularly established in this province at the beginning of last year for the first time, and the price of tombac rose, or rather, I should say, was raised at once nearly 300 per cent. The consequence was that all but the well-to-do gave up, at all events for a time, smoking tombac, many finding that it was cheaper to smoke coffee, which was actually done in some of the native houses. I should also say that the existing stocks of tombac as found by the inspector of the société when taking over charge were so large that it was not found necessary to make fresh importations. Of course, a Tombac. Société de Tombac.

great deal is smuggled in spite of the increased activity displayed by the coastguard steamers belonging to the above-mentioned company, which, especially on the Yemen coast, are constantly on the look-out for the contraband traders. These enterprising persons do a very brisk business, I am informed, by landing their cargoes of tobacco in Aden and then bringing them up overland into the Yemen, and so finally into the Hejaz. There are three kinds of tombac, viz.: kaiseroon (which is grown in Persia), hummi which is the product of the southern districts of Hadhramont, and bedowi which is grown in the Yemen. The last is very inferior and is only smoked by the very poor.

Contraband trade.

Tobacco.

Tobacco, in its simple state and in the form of cigarettes, which comes entirely from Constantinople, was imported in unusually large quantities last year, and here again, I have no doubt, the most abnormally large number of pilgrims who visited Jeddah contributed some of the best customers for the tobacco dealers.

Sugar.

There was a very considerable rise in the importation of sugar which comes mostly from Trieste, also from Marseilles and Egypt.

Coffee.

Coffee, the well-known "Mocha" (a misnomer now for that town no longer exists) from Hodeidah, in the Yemen, was rather less in amount than usual, while the import of dates from Busrah was very much above the average.

Dates.

Petroleum.

The only other article of any importance is petroleum, of which a most unusually large importation was effected last year. It is entirely of American origin, the Russian article obtaining no sale whatever here. An attempt was made a few years ago to introduce the latter into this country, but it failed partly because it was found to be much inferior in quality to its American rival, and partly because although it was a little cheaper than the latter, yet the difference was not sufficiently great so as to counterbalance the most distinctly inferior nature of the article.

No market for Russian petroleum.

It should be remembered also that petroleum tank-steamers are not allowed to pass through the Suez Canal, a restriction which tends greatly to handicap Russian petroleum, which is generally exported in that way, although, of course, a great deal is put up in tins.

Then again, as a rule, a whole steamer is chartered for the transport of petroleum alone from New York, which if it be considered that not Jeddah only but Hodeidah and Aden are supplied by the same vessel, while both Suakin and Massowah draw their supplies from this town, becomes perfectly intelligible.

Exports.

Exports yearly less and less. Mother-of-pearl.

The total value of last year's export trade was less than 22,000*l.*, and I fear that in the future it is likely to be still less. Eight years ago the total value of the mother-of-pearl shells exported from Jeddah was as much as 42,000*l.*; last year it was

only 5,250*l.* Gum of the total value of 19,000*l.* was exported from this province in the course of that year, 1886, whereas last year this once important product of Arabia was exported to the extent of 2,350*l.* worth only. Gum.

Skins and hides alone are still exported as much as ever, and, indeed, they contribute more than half of the whole export trade. It may, perhaps, be admitted that last year was an exceptionally good year for those who deal in this class of goods, owing to the extraordinary number of pilgrims. It will be understood that the more numerous the pilgrims, the more numerous the sacrificial victims slain in the valley of Muna, and, consequently, the greater the number of skins and hides available for exportation. Skins and hides.

Mother-of-pearl, which at one time was the principal article of exportation here, has not only ceased long since to occupy that position, but threatens to disappear gradually from the list of exports. Last year, I am informed on good authority, the Bedoween actually brought none in for sale. Traders had to go and seek them out, and buy such as was to be had in exchange for cottons, &c. As explained in my report for the year 1892, the Turkish Government has only itself to thank for the disappearance of this article of exportation from the Jeddah market. If the same article be subjected to an 8 per cent. import duty here, and to a duty of 1 per cent. only in the ports of Suakin, Massowah, and Aden, there can be no doubt as to what will happen. In all probability it will soon disappear altogether from the markets of the Hejaz. Mother-of-pearl. Heavy import duty.

The exportation of gum is also diminishing every year. Jeddah gum is of a good quality though not equal to that of Kordofan, which is nearly white and more friable than that which is found in this district. But it is not so much any defect in quality that is the cause of the yearly diminishing exportation of this article; it is the tremendous falling-off of late years in the demand for gum arabic. I am informed that the chief reason of this is that, in most respects, an admirable substitute for gum arabic has recently been found in Madagascar and in some parts of North America which is infinitely cheaper. In point of adhesiveness the newly-found gum is quite equal to that which comes from this country, though it is far from being so pure. In this latter respect gum arabic is without a rival, and on that account will always be sought for by chemists and others to whom this qualification is a sine quâ non; but, naturally, theirs is only a very small demand compared with that which formerly existed in commercial circles. Gum. In the future will be used chiefly by chemists.

Shipping.

Last year's shipping returns are decidedly satisfactory, showing as they do a very considerable advance on those of recent years, while British shipping in particular does not exhibit the slightest tendency to recede from the position of undisputed pre-eminence British vessels.

which it has always occupied. Speaking roughly, the Red Sea carrying trade is effected in British and Egyptian bottoms, because, although the Dutch flag figures most conspicuously in the table, yet the amount of goods actually brought to Jeddah in Dutch bottoms is extremely small. Indeed, were it not for the fact that many of Mr. Alfred Holt's steamers, which frequent this port and land a certain quantity of Manchester goods, carry Dutch colours, the importations into Jeddah under this flag might almost be considered insignificant. The Dutch steamers which figure in the return belong to three companies: the Stoomvaart Maatschappij "Nederland," the Stoomvaart Maatschappij "Oceaan," of Amsterdam, and the Rotterdamsche Lloyd, of Rotterdam; but although in point of tonnage, as mentioned above, they rank next to British vessels, they are by no means serious rivals for the latter in the general cargo-carrying trade, seeing that the great majority of them are, in so far as Jeddah is concerned, engaged in the pilgrim trade only.

Dutch vessels.

Egyptian vessels.

The Egyptian steamers, which, taken numerically, stand second on the shipping list, belong to the Khedivieh Company, of which the main branch has secured for its vessels such an excellent position in the Eastern Levant carrying and passenger trade. These Red Sea "Khedivieh" boats bring the fortnightly mails from Suez, to which port they return after touching at Suakin, Trinkitat, Massowah, Hodeidah, and Aden, the same ports being visited in inverse order on their way back. These boats are, many of them, very old, and sadly want replacing. At the same time it is only just to mention the undoubted fact that as regards casualties their record is remarkably good.

Turkish vessels.

French vessels.

Austrian vessels.

The Turkish steamers figuring in the list belong mostly to the "Idare'-i-Makhsoussé" Company, of Constantinople, and are more especially engaged in carrying pilgrims and troops. The French steamers which frequent this port are exclusively engaged in the pilgrim traffic, and so are never seen in these waters except during the pilgrimage season. The four Austrian vessels which entered and cleared from here during the year belong to the Austrian Lloyd Company, whose steamers have begun to make a more frequent appearance here than has been the case in recent years.

On the whole, therefore, I repeat the position occupied here by British shipping is very satisfactory.

Pilgrim traffic.

Last year's pilgrim season was in every respect the most remarkable that has ever been witnessed in this country. Owing to the fact that the principal day of the Haj (the 9th Yilhidjé) fell on a Friday it was confidently anticipated that the number of pilgrims would be very much in excess of the average, but the reality outstripped even the most sanguine predictions. The number of pilgrims landed at Jeddah and Yambo last year was 92,625, *i.e.*, about double the average number, and if the whole number of pilgrims be calculated it was certainly not less than 250,000, while it has been put as high as 300,000 by persons well qualified to form a correct opinion.

The list is headed by British Indians, nearly 15,000 persons,

these numbers being, however, nearly equalled by North Africans (Moors, Algerians, Tunisians, and Tripolitans), Javanese (Dutch East Indians), and Egyptians, while the pilgrims of various other nationalities showed in every case a very considerable increase on the usual numbers.

As might have been expected cholera broke out at Mecca long before the usual time of its appearance, owing to the presence of such vast numbers of human beings crowded together into the narrow Mecca valley, the weather at the same time being more than ordinarily sultry. The epidemic raged furiously so long as the pilgrims remained at Mecca, the daily number of deaths being at one time, even according to the official return, 1,000, and, subsequently, when the pilgrims came down to Jeddah in order to embark for their various destinations, the disease broke out here, and was soon carrying off its victims at the rate of 500 to 600 a day. The total mortality amongst the pilgrims who went to the holy places by sea was, even according to the official returns, which are certainly below the mark, 9,577, while amongst those who went to Mecca by land the death-rate was even greater, and has been put as high as 15,000. It will easily be understood, therefore, that not only was last year's Haj memorable for the extraordinary number of those who took part in its ceremonies, but the ravages made in their ranks by cholera were also far beyond any previous record. Indeed, to a great extent this may be considered as a case of the ordinary sequence of cause and effect, although undoubtedly the fact that the simoon (or desert wind) was blowing steadily and unintermittently for 11 days during the latter end of May, while the heat during the first 10 days in June was unusually intense, contributed not a little to the development of conditions under which the rapid spread of the disease was inevitable.

As regards the nationality of the vessels employed for the conveyance of the pilgrims to and from Jeddah and Yambo, about 45 per cent. of them were under British colours, Egyptian and Turkish steamers coming next on the list, while the French vessels secured most of the pilgrims bound for the North African ports.

Agriculture.

With the exception of a narrow belt of country in the immediate neighbourhood of Taif, a small town situated in the hill country, about 140 miles to the east of Jeddah beyond the Kora Kharrah range of mountains, where a certain amount of wheat, barley, lentils, and chickpeas are cultivated with some success, but only in sufficient quantities to supply the needs of the immediately surrounding population. With the exception, I say, of this single fertile spot the Hejaz is absolutely barren, and produces nothing but dates, and here and there a few bananas.

Public works.

Nothing in the way of public works was done here last year.

RETURN of Principal Articles of Import to Jeddah from India during the Year 1893.

Articles.		Quantity.	Value
			£
Rice	Quarters ..	71,450	133,370
Wheat flour	,, ..	12,250	22,560
Wheat	,, ..	2,856	12,480
Maize	,, ..	2,486	2,578
Chickpeas	,, ..	444	580
Lentils	,, ..	215	280
Barley	,, ..	470	370
Cotton goods	Bales ..	920	12,282
,, ,, ...	Cases ..	620	14,222
,, ,, ...	Bundles ..	460	43,445
Powdered sugar	Cwts. ..	12,000	11,076
Coffee	,, ..	1,130	5,133
Tea	,, ..	800	6,150
Ginger	,, ..	660	6,272
Pepper	,, ..	2,200	5,500
Sesame	,, ..	4,500	2,410
Cardamum	,, ..	185	1,280
Other groceries	..	..	5,070
Silk	Cases ..	28	500
Timber (planks and beams) ..	Number ..	181,600	11,080
Iron and nails	Tons ..	225	2,900
Copper	Cwts. ..	650	2,925
Tin	Cases ..	1,012	787
Pewter	Cwts. ..	150	990
Perfumes	,, ..	75	1,070
Aloe-wood	,, ..	27	1,650
Indigo	,, ..	120	1,065
Hemp, ropes, &c.	,, ..	2,170	1,925
Window glass	Cases ..	370	330
Cocoanuts	Number ..	40,000	130
Sesame-oil	Cwts. ..	1,140	1,520
Various	..	..	7,500
Total	..	..	320,110

RETURN of Principal Articles of Import to Jeddah during the Year 1893.

Articles.	Countries Whence Imported.		Quantity.	Value.
				£
Wheat	Busrah and Egypt	Quarters	32,750	22,475
Barley	,,	,,	9,560	7,550
Beans	Egypt	,,	1,060	1,455
Chickpeas	,,	,,	160	300
Lentils	,,	,,	190	375
Maize	Busrah	,,	3,900	4,350
Other cereals	Yemen	..	..	11,650
French beans	Trieste and Constantinople	..	..	650
Cotton goods	England	Bales	397	37,715
,,	,,	Cases	109	6,000
,,	Syria and Egypt	Bundles	495	17,500
Carpets	Persia	Bales	350	23,300
Rugs	,,	,,	175	7,425
Tombac keiseroun	,,	Cwts.	950	3,800
Cigarettes and tobacco	Turkey	,,	2,500	37,500
Sugar	Marseilles, Trieste, and Egypt	,,	19,298	23,275
Powdered sugar	Trieste	,,	6,500	2,745
Coffee	Yemen	,,	2,500	12,500
Dates	Busrah	,,	36,200	11,605
White deal planks	Trieste	Planks	7,600	950
Soap	Syria	Cwts.	4,200	5,450
Petroleum	North America	Cases	60,000	12,000
Ghee	Busrah and Yemen	Cwts.	1,500	4,535
Incense	Hadramout	,,	440	335
Mahlep	Turkey	,,	750	1,335
Cotton	Yemen	,,	576	300
Tin-plates	England	Cases	675	525
Various	,,	,,	..	6,000
Total	..	..	..	263,600

RETURN of Principal Articles of Export from Jeddah during the Years 1893.

Articles.		Quantity.	Value.	Whither Exported.
			£	
Goat-skins	Number	37,000	2,400	America and England
Sheep-skins	,,	135,000	8,750	,, ,,
Ox-hides	,,	1,500	170	,, ,,
Henna	Lbs.	80,000	1,000	Turkey
Senna	,,	34,000	500	England
Gum arabic	Cwts.	2,620	2,350	,,
Tortoise-shell	Lbs.	400	200	,,
Mother-of-pearl shells	Cwts.	2,000	5,250	America and England
Honey	,,	60	150	India
Wax	,,	60	300	,,
Lavender	,,	1,500	500	Persia and India
Almonds	,,	500	400	India
Total	..	..	21,970	

RETURN of all Shipping at the Port of Jeddah during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	138	186,163	138	186,163
Turkish	3	2,004	54	34,936	57	36,940
Dutch	...	...	37	60,973	37	60,973
Egyptian	...	...	62	41,775	62	41,775
French	...	...	25	24,980	25	24,980
Austrian	...	...	4	6,474	4	6,474
Zanzibarian ...	...	...	8	1,784	8	1,784
Total	3	2,004	328	356,245	...	358,249

NOTE.—All the above ships having cleared from this port, it has not been thought necessary to make out a separate return under that heading.

RETURN of all Pilgrims who Landed at Jeddah and Yembo during the Haj Season of 1893.

Description.	Number of Pilgrims.
British Indians	14,772
Egyptians	13,361
Moors, Algerians, &c.	14,441
Javanese	13,856
Turks and Syrians	8,427
Arabs	2,162
Persians	1,757
Yemenese	6,410
Soudanese	277
Bokharians	4,692
Pilgrims who landed at Yembo	10,018
,, arrived by coasters, nationality unknown	2,452
Total	92,625

HODEIDAH.

Mr. Vice-Consul Tameezuddeen Ahmed reports as follows:—

Shipping and Navigation.

153 steamers entered and cleared the port of Hodeidah in 1893. Within the above-mentioned period 88 British steamers, tonnage 29,519; 35 Egyptian steamers, tonnage 23,304; 27 Turkish steamers, tonnage 17,534; and 1 Austrian steamer, tonnage 1,286, brought and carried cargo to and from Hodeidah.

During the year under report six British steamers came here from different parts of the United Kingdom of Great Britain and Ireland; and one British steamer, with petroleum, arrived from New York. Turkish steamers mostly brought soldiers from Constantinople, and took away from this place soldiers who had about 2 years of active service in the interior of Yemen, where, even now, things are not in a very satisfactory condition. Egyptian steamers starting from Suez, touching Jeddah, Suakin, Trinkitat, and Massawa on their way to Hodeidah, went back to Suez with cargo and passengers. These steamers generally arrived here once in every fortnight. But in 1893, owing to Hodeidah remaining in quarantine from June till October, 1893, they did not touch Hodeidah during that time. As before, British steamers belonging to the Bombay and Persian Gulf Company, Haji Kasim, Messrs. Cawasjee Dinshaw, and Brothers, of Aden, and the Perim Coal Company's steamers "Myun" and "Hornet," chartered by the Tobacco Monopoly Company of the Ottoman Empire, visited this place in the course of the year 1893. One Austrian steamer touched this port in the year under review.

Exports and imports.

I received the following return of exports and imports for 1893 from the Turkish custom-house authorities of Hodeidah :—

EXPORTS.

Articles.		Quantity.	Approximate Value.
			£
Hides and skins	Bales.. ..	7,181	94,933
Coffee for Europe and America	Bags	24,000	160,000
Coffee for Egypt	„	25,000	166,666
Sundries	Packages ..	48,500	330,000
Total	..	..	751,599

IMPORTS.

Articles.		Quantity.	Approximate Value.
			£
Provisions, &c.	Packages ..	150,000	300,000
Piece-goods from India ..	Bales	25,000	100,000
„ America .	„	500	4,666
Petroleum	Cases	123,987	33,063
Silk and silver	Packages ..	1,000	20,000
Sundries	„ ..	35,181	234,540
Total	..	..	692,269

Exports: Manufactured goods.

From Hodeidah and the interior of Yemen, with the exception of a kind of roughly-made stuff used by the Arabs for wear, and

a sort of printed cloth, very few manufactured goods find their way to other countries.

Pearl, &c. Pearls, mostly contraband, owing to high duty levied by the Turkish Government, and in many instances owing to their confiscation by Turkish officials for their own use; senna and myrrh for medicinal purposes; sharks' fins, tortoise shells, and mother-of-pearl are exported to India, and are sometimes transhipped from Aden to Europe.

Coffee. During the year under report less coffee than before was sent to Europe and other places, because (1) in the year 1892 very large quantities of it were taken to the above-mentioned places, where market was already full; consequently the agents of the American firms here were instructed not to buy much of the article, unless very cheap; (2) there was not much rain in the year 1893 in the hills and the cultivated parts of Arabia, where in former years plenty of rain fell, and the people had a good harvest; hence a smaller quantity of coffee arrived from the interior, and coffee sellers here demanded a high price; (3) the silver question in America and in Europe made the coffee market of this place very dull.

Hides and skins. Although the export of hides and skins was about the same as the year before, yet, owing to the shaky condition of many American firms, whose agents were the largest buyers of the stuffs here, and owing to the rivalry of certain two firms here, the price of hides and skins rose very high for some months; consequently the demand afterwards was not as much as was expected.

Rock salt. Rock salt, which abounds in Salif, is shipped annually in large quantities to India. In 1893, 6,580 tons of it, worth about 2,166*l.*, were taken to India. In the above-mentioned year only two ships carried rock salt to Calcutta, whilst in the year 1892 three ships were employed for the same purpose. In June last I again visited Salif, where the pier has been built of stones, and trucks loaded with salt run on rails, nowadays, from the salt works to the pier.

Imports: Provisions. Of the articles of import, provisions are principally brought from India by the British-Indian merchants of Hodeidah, and a small quantity is sometimes imported from Europe. Nowadays, besides the demand of provisions for general consumption by the inhabitants of Yemen, large quantities of sugar and flour are required for the supply of over 15,000 Turkish soldiers, who are in a way permanently stationed in different parts of the province.

Sugar is usually brought from Mauritius, and sometimes from India; but the Mauritius sugar is preferred.

Cotton and piece-goods, &c. Cotton, piece-goods, and sheetings come from America, India, and sometimes, through British-Indian merchants, from Great Britain. I dare say if samples, with quotation of prices, were sent from Manchester and other places of the United Kingdom, more demand in this tissue would be made in future by the inhabitants of Arabia, especially because, in the latter part of 1893, one of the largest American firms, which used to import largely the above-mentioned articles here, has failed.

Petroleum in large quantities is brought from America. In 1893, 41,000 cases of it came from Batoum. Although the American oil is dearer, yet the people would rather have that than the other, which smokes much and gives less brilliant light. Petroleum.

Hardware, metal, timber, and paper are imported from Austria into this place by the Italians and the Greeks. British Indian merchants bring timber and metal from India and other parts of the East. In December last I saw lots of iron tubes and other materials for telegraphic wire of British manufacture, which have been bought by the Turkish Telegraph Department for use in Yemen. Hardware, timber, metal and paper.

Dates, which are the staple food in some parts of the interior of Yemen, are supplied here through the Persians and the Indians from Busra and places near the Persian Gulf. Dates.

Persia sends carpets to Hodeidah. Carpets.

Since the year 1892 a company, which I have referred to before as the Tobacco Monopoly Company of the Ottoman Empire, and which goes here under the name of Société de Tombac, has taken from the Government of Turkey the monopoly of all kinds of tobacco which are used in the Yemen; consequently other merchants here have been debarred from carrying on any trade in that line. From September last two British steamers belonging to the Perim Coal Company were chartered by the above-mentioned company, and employed for coastguard duty. Many overseers and inspectors, with men under them, were sent into the interior to prevent the importation into the country of contraband tobacco; but the results of the operation have not been very satisfactory. Now one steamer belonging to the above-named company, especially made and fitted in Scotland with an electric search-light and other things for coastguard duty, has arrived here. Later on two or three more will come. Société de Tombac.

I have given below a very rough idea of the quantity, approximate value, and kind of tobacco which has been imported here by the above company during the year 1893:—

Tobacco Import.

Description.		Quantity.	Approximate Value.
			£
Hamoomi	Bales	4,000	53,333
Surati	„	1,000	26,666
Cigarette tobacco	Cases	600	15,000
Total	..	..	94,999

The province of Yemen, in Arabia, is very fertile. By the ancient geographers it was called "Arabia Felix," *i.e.*, "Happy Arabia," because, leaving a strip of country of about 20 miles in breadth all along the Red Sea, its other parts have got arable soil. Agriculture: Soil.

Small rivers coming from the adjacent parts and hills that intersect the country in various directions, increase the productiveness of the land.

Crops. There are in the interior everywhere two crops, and in some places three crops in every year. During the months of June, July, and August, plenty of rain falls in the interior. Sometimes in winter months, *i.e.*, November, December, and January, there are rains in those places.

Vegetable products. There was very little rain in the year 1893, consequently there was less supply of coffee in Hodeidah for exportation. Except the Bedouins of the places bordering on the desert part of Arabia, and those that live in the desert, the inhabitants of the Yemen on account of the richness of the soil of their country grow, besides coffee, corn, lentils, vines, fruits of many kinds, maize, joari, brindis, and sweet potatoes. Cabbages, cauliflowers, carrots, and turnips are cultivated in the cool parts of the province-like places round about Sanā, where the temperature in winter times varies from 60·8° Fahr. to 68° Fahr.

Animals. Among the domestic animals, donkeys, camels, and sheep are found. Except deer and gazelle there are very few wild animals in Yemen. Proverbially fleet Arabian horses are brought here from other parts of Arabia.

Minerals. Many places in the interior of Yemen are said to contain petroleum, coal, iron, and silver, and in some places gold is found. But owing to the unnecessarily suspicious nature of the Turks, difficulties have been put in the way of others obtaining permission to work out the products, or even visiting the places. I have already made mention of rock salt.

Population. The population of Yemen numbers about 3,000,000, and that of Hodeidah about 50,000. Here in Turkish Arabia, at least in the Yemen, there is no such custom among the Turkish officials as we have got in India, where inspecting officers in every district, annually, go out on tour not only to collect revenue, but also to make statistical inspections and thorough investigation into matters concerning the welfare of the people of the country. On the other hand, I found here that the Governors and other high officials went out into the district for money-collecting purpose only. Therefore there is no source for obtaining reliable information as regards vital statistics, &c., of the country. I have been informed that sometimes the Governors, on their transfer or dismissal, used to take away books of report, &c., along with them.

In my last year's report I gave a general description of the moral and intellectual condition of the Arabs of the present day. Although the Arabs are still divided into tribes or kafelas, somewhat like the clans in Scotland, yet the unity amongst the clansmen is nowadays not much; hence the Turks have been able to get a sort of permanent footing in this country. The Arabs of pure breed here are generally of lighter colour, thinner, more active and hard working than the mixed race which is found in seaport towns. The Bedouins who came here for trading purpose are mostly of brown colour, very wiry, with brilliant eyes, long

curly hair and beard. The Bedouins bring coffee on camels, and take away in return petroleum and dates, the latter forming the principal part of their food. If they have any altercation with any British Indian subject here, these men, instead of going to the Turkish Government to obtain justice (which is the custom amongst the Arab inhabitants of Hodeidah), come to the British Consular Court, the decision of which seems to them satisfactory and prompt. Their cast of features is more of Caucasian than of Semitic type.

Industry: Agriculture. The Yemen being the most fertile part of Arabia, the Hadisi Arabs of the country, *i.e.*, the Arabs that have settled themselves in villages, are an agricultural people. In towns bordering on the sea the inhabitants build boats, *i.e.*, sambooks and buggalows, carry on trade, and engage in commercial enterprises in the Red Sea and the Persian Gulf. They go sometimes as far as India. Manufacture is limited to the printing of a kind of cloth, and the dyeing and weaving of another sort of cloth.

Trade.

Manufacture.

Public Works.

Railroads, &c. There are no railroads in the province of Yemen. Although the Turks know that Hodeidah is growing in commercial and political importance, yet, probably owing to the financial difficulties of their Government, not even one ordinary good road has been made from this place to Aden or to Sanā. I have been informed by the Turkish Commander-in-Chief of Hodeidah and the Governor that in 2 years' time a good substantial road for traffic, as well as for the transport of Turkish troops into the interior, will be constructed.

Inland post. Every week during the Haj season letters go to and come from Sanā, Loheya, and Cāmaran.

Sea post. The Egyptian steamers used to carry mails from Suez, Jeddah, and Massowah regularly once in every fortnight until June last. From October last they have begun again a regular fortnightly service. The mails from India and England viâ Aden arrive here regularly once every week by the steamship "Woodcock," of Messrs. Cowasji Dinshaw and Brothers, of Aden.

Transit. Transit from London is in about 3 weeks and from Bombay in about 10 days.

Telegraph. Telegraphic communications at present exist between this place and Sanā, Jeddah, and Aden, viâ Perim. A line is in construction between Camaran and Hodeidah, because in former years, during the Haj season, many pilgrim steamers used to be inconvenienced for want of speedy transmission of messages to and from Constantinople.

General Remarks.

Municipality. There is a sort of municipality at Hodeidah, and through the exertions of Syed Ahmed Shirai Pashi its chief improvements are

seen in every way. A nominal tax is levied from the inhabitants within the city walls for conservancy.

The Hodeidah Pier.

I again repeat my regret about the pier of Hodeidah which is in a terribly battered condition. I wrote several letters to the Governor-General at Sanā and to the Governor of Hodeidah at different times without any success. I always received a promise that it would be built anew soon. About the middle of October last a Turkish inspecting officer of high rank arrived here from Constantinople, and at the time of his departure showed me a sketch of a pier which he thought should be erected at Jabbana, a place about 5 miles distant from this place; and told me that tramway car communication should be opened between Jabbana and Hodeidah. But again, I suppose, financial difficulty is the cause of this delay. Although pier dues are levied regularly from the merchants, still the Hodeidah pier is in a wretched state. If a substantial stone pier were built and the harbour improved by buoys and the placing of lights in dangerous and shallow places which are not few in the neighbourhood of Hodeidah, I am confident that British trade will increase.

Diseases, &c.

In 1893 there was no case of cholera at Hodeidah, but most likely there were some sporadic cases in the interior as this port remained in quarantine till September last. The plague visited Loheya, which until very recently was in quarantine. At present dengue fever is prevalent at Hodeidah, but no loss of life from this has yet been recorded. In my last report I mentioned a kind of ulcer resembling "oriental sore" affecting many persons in this country. In 1893 I came across many cases of apparent blindness which is probably caused by the sandy soil of Hodeidah and by the extremely keen rays of the sun. During the year under report, owing to scanty rain, very few persons suffered from ague.

Wind.

Here at Hodeidah the south-west wind blows very strongly from November till March, and then the direction changes to the north-east. If there is a north-east wind in winter the inhabitants of this place are attacked by fever (simple).

Approximate proportionate ratio of import trade.

The following are the approximate proportionate ratios of import trade of 1893:—

Description.	Per Cent.
The Indians	70
Greeks	12
Italians	8
Americans	6
Arabs and others	4

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1358.	Guayaquil	4½d.	1419.	Berlin	1½d.
1359.	Cadiz	1½d.	1420.	Nice	2d.
1360.	Marseilles	1½d.	1421.	Yokohama	1½d.
1361.	Brest	1d.	1422.	Maracaibo	1d.
1362.	Syra	2½d.	1423.	Tunis	1½d.
1363.	Suakin	1d.	1424.	Baghdad and Bussorah	1d.
1364.	Callao	1d.	1425.	Rio Grande do Sul	7d.
1365.	Piræus	2d.	1426.	Erzeroum	1d
1366.	Stettin	2d.	1427.	Christiania	5½d.
1367.	New Orleans	2½d.	1428.	Charleston	5½d.
1368.	Angora	1d.	1429.	Meshed	1d.
1369.	Antwerp	2d.	1430.	Copenhagen	½d.
1370.	Genoa	3½d.	1431.	Galveston	2½d.
1371.	Batoum	2d.	1432.	Hamburg	2½d.
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1374.	Nantes	1½d.	1435.	Kiungchow	1d.
1375.	Taganrog	2½d.	1436.	St. Petersburg	½d.
1376.	Ispahan	1½d.	1437.	Malaga	1d
1377.	Leghorn	2d	1438.	Chicago	2½d
1378.	Cagliari	1d.	1439	Odessa	2d.
1379.	Boston	1d.	1440.	Tabreez	½d.
1380	Palermo	3d.	1441.	Tahiti	½d.
1381.	New York	2d.	1442.	Shanghai	2d
1382.	Zanzibar	2d.	1443.	Nagasaki	1d
1383.	Naples	1½d.	1444.	Madrid	2½d.
1384.	Constantinople	2d.	1445.	Malaga	2½d.
1385.	Buenos Ayres	5½d.	1446.	Rotterdam	1d.
1386.	Caracas	1½d	1447.	Port Said	1d.
1387.	Vienna	1½d	1448.	Sofia	2½d.
1388.	Madeira	½d.	1449.	Warsaw	1½d.
1389.	Panama	1½d.	1450.	Africa (Congo)	2d
1390	New Orleans	2½d	1451.	Jeddah	1½d
1391.	Manila	2d.	1452.	San Francisco	5½d.
1392.	Foochow	1d	1453.	Oporto	2d
1393.	Ningpo	1d	1454.	Barcelona	2d.
1394.	Chinkiang	1d.	1455.	New Caledonia	½d.

No. 1456.

Reference to previous Report, Annual Series No. 1254

TURKEY.

SMYRNA.

Consul-General Holmwood to the Earl of Kimberley.

My Lord, *Smyrna, July* 25, 1894.

I HAVE the honour to transmit herewith my Commercial Report for the Year 1893.

I have, &c.

(Signed) FREDERIC HOLMWOOD.

Report on the Trade and Commerce of Smyrna for the Year 1893.

ABSTRACT of Contents.

	PAGE
Exports	1
Imports	2
Shipping	2
Prospects for 1894	2
Raisins	2
Railways	3
Shipping returns..	6

Exports.

Notwithstanding a favourable harvest and a good yield from all the principal crops of the country, the past year has been a bad one for commerce, and even disastrous to the growers of produce.

This misfortune is entirely owing to the continued low values of produce in the European markets, which in the case of many productions of Turkey have gone from bad to worse. So great has been the depreciation in the prices of raisins and dried fruit

that immense quantities grown for export have been retained in the interior, where for the past 8 months horses and cattle have been fed on raisins and other dried fruit.

Unhappily there seem to be no signs of revival in the produce trade in Europe, while, on the other hand the products which have hitherto been exported solely by Asiatic Turkey are now being extensively grown in Southern Russia, and this must result in over-production, at any rate during periods of universal depression of trade.

Imports.

The value of imports during the past year was nearly the same as in 1892, but this practically represents a diminution of trade, as the largely-increased area brought under cultivation by railway extension had already commenced to open up new markets in the country for manufactured goods.

Statistics of Trade.

The failure this year of a special source of information has rendered all my efforts to supply accurate statistics fruitless, but other arrangements have now been made which will, it may be hoped, render the commercial returns of this country exceptionally reliable for the future.

Shipping.

The shipping trade of this port has suffered, as might be expected, through the general depression, but a very slight reaction in the European markets will speedily cause a revival in this branch of commerce.

Prospects for 1894.

With the exception of the bean crop, which has proved more or less a failure, and, perhaps, opium also, the outlook for this year is most favourable. But unless a rise in prices occurs in the autumn the most prosperous season will not insure the prosperity of the country in a commercial sense.

Raisins.

This staple production of Asiatic Turkey has, principally through the action of the French tariff, become so depreciated in value, that unless some new market can be found, the cultivation of the vine in this country will have to be discontinued. This will cause widespread misery among the agricultural classes, who

cannot command the capital to enable them readily to substitute new branches of agriculture.

Railways.

The most important question affecting British interests in this country at the present moment is that of the pending railway extensions, and the serious injury which they threaten to British influence.

The situation is a complicated one, but the following brief description will render sufficiently clear the dangers it involves for British capital and British commerce.

The port of Smyrna is, and is likely to continue to be the emporium for the commerce of Asia Minor. Its advantageous situation and the exceptional facilities it affords to shipping, must always attract the major part of the trade of the interior, and while the completion of pending railway communications will probably double the trade in a few years, the new lines will not be likely to divert any considerable proportion of it, at any rate of the exports, to any other port with which they may communicate.

Railway communication between Smyrna and the interior is in the hands of two British railway companies, the "Aïdin" and the "Cassaba," and these lines are safe from other competition. Their combined capital amounts to over 5,000,000*l.* sterling. But these lines extend only 240 miles inland, and a German syndicate has recently obtained a railway concession from Ismid (practically from the Bosphorus) to Karahissar and Konia and thence eventually to Baghdad, thus cutting off the two British lines from all extension E. and S.E. There can be no doubt that the bulk of the produce of Konia and the far interior will on arrival at Karahissar be transmitted to the port of Smyrna, and early in the history of this undertaking it therefore became a question as to which of the two British lines should absorb this traffic.

I took this opportunity for renewing a recommendation which I had previously given as to the advantages of an amalgamation of our two lines, and warned our companies of the danger of allowing minor interests to prevent an alliance which alone could secure the future success of both.

The Aïdin railway was the natural line of communication because the short extension which would be necessary from its present inland terminus at Diner to Chaï on the German line, would pass through a comparatively level country.

That company, however, failed to obtain from the Sultan a concession for such extension.

The Cassaba railway on the other hand would require to construct a longer branch from its inland terminus at Alashehir to Karahissar on the German line, and this line would pass over a mountainous country necessitating heavy gradients which would involve a cost probably three times as great as by the other route.

A French syndicate, however, has obtained a concession for this extension, and has now come to a provisional agreement with the Cassaba Company, giving the syndicate the right to purchase their line at any time before the end of July, a date which, I believe, is about to be extended.

If, at this juncture, the two British companies could arrange for an amalgamation of their interests there can be little doubt that the French syndicate would be glad to join them, and that means would be found admitting of the adoption of the less costly and more direct and convenient route to Chaï.

This would save the French syndicate from the necessity of finding the large capital which will be indispensable as the arrangement now stands, while it would get rid of the one serious drawback to the Aïdin line, namely, the heavy gradients and narrow tunnel on its Ephesus section, which could then be wholly avoided by a short branch connecting the two railways.

There will, no doubt, at this late stage, be difficulties in bringing about the triple coalition here indicated, but it appears to be well worth consideration, for the combination could not fail to greatly benefit each of the three companies interested.

In connection with this suggestion it must be borne in mind that though the German Company will have no option as to the transit of a large proportion of its freight to Smyrna, yet, if the recent agreement is carried out, it will be able to impose onerous terms on the new French company, already burdened with the excessive cost of its mountain extension, for the Germans will be able to hold over them the threat of an extension of the Aïdin line to Chaï, and a transference of their carrying trade to the rival line.

Were a triple amalgamation brought about, the reverse would be the case, for the free action of such a coalition could not possibly be hampered by competition in connection with the Smyrna traffic.

There is another view of this question which may be worth consideration.

There can be little doubt that sooner or later the Aïdin company will obtain the concession for its natural extension to Chaï, if only for strategic reasons.

But if the proposed Karahissar extension of the present Cassaba railway be carried out by the French syndicate, it is very doubtful how far two competing companies, supplemented to a certain extent by the competition of a third company running to Ismid, will find sufficient traffic to pay reasonable interest on three separate large capitals.

It is true that both the German and the new French syndicates have obtained from the Sublime Porte guarantees of traffic amounting to from 500*l.* to 800*l.* per mile, and that in view of the competition which will doubtless ensue, the probabilities are that the Ottoman Government will have to contribute large sums annually to each of those companies, but the Aïdin company, which would then be the only British line connected with Smyrna,

has no guarantee of this nature, and the Chaï extension would be too short to render such a guarantee valuable. It, therefore, appears to me that the alliance which has been suggested is in their case more desirable than ever, for their own as well as for general British interests.

If I have been earnest in pressing these views on British capitalists, those who have had practical experience of the advantages to commerce which ever follow railway communication abroad under British management may appreciate the reasons for persistence in this instance.

Those also who know the capabilities of this country will not fail to foresee the importance of the new market which railway extension is about to open up to trade.

There is no reason to suppose that it is now too late for amalgamation; on the contrary, difficulties are bound to arise in obtaining the large capital, without which the scheme now pending cannot be carried out, and, in the meantime, the advantages which would attach to a coalition will daily become more obvious to the supporters of the French syndicate.

RETURN of Shipping at the Port of Smyrna during the Year 1893.

ENTERED.

Nationality.	Steam.				Sailing.			
	With Cargo.		In Ballast.		With Cargo		In Ballast.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	133	148,101	105	123,018	..	..	..	..
German	56	60,487	..	..	..	..	..	..
Austro-Hungarian	166	178,195	..	..	8	1,617	..	..
Danish	13	19,947	..	..	..	..	..	..
Egyptian	75	71,344	..	..	..	..	..	..
French	157	191,984	..	..	..	..	..	..
Greek	241	199,181	..	..	205	21,722	..	..
Dutch	22	18,975	..	..	..	..	..	..
Italian	50	75,135	..	..	16	7,909	..	..
Russian	72	121,805	..	..	..	..	..	..
Swedish and Norwegian ..	7	8,417	..	..	..	..	..	..
Turkish	227	121,211	..	..	212	22,304	19	742
Montenegran	..	..	..	..	1	192	..	..
Samian	..	..	..	..	86	1,812	..	..
Total	1,219	1,136,782	105	123,018	528	55,554	19	742

NOTE. The above table does not include vessels that only called at the Vourlah Quarantine Station during the cholera epidemic, vessels under 30 tons, and the small coasting steamers that ply between Smyrna, Vourlah, and Aivali.

RETURN of Shipping at the Port of Smyrna during the Year 1893—continued.

CLEARED.

Nationality.	Steam.				Sailing.			
	With Cargo.		In Ballast.		With Cargo.		In Ballast.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	209	240,583	29	32,230	..	..	..	..
German	56	69,487	..	..	..	..	..	..
Austro-Hungarian	166	178,195	..	..	8	1,617	..	..
Danish	13	19,947	..	..	..	..	..	..
Egyptian	75	71,344	..	..	..	..	..	..
French	157	194,984	..	..	..	..	..	..
Greek	241	109,181	..	..	205	21,722	..	..
Dutch	22	12,975	..	..	..	..	..	..
Italian	48	73,160	..	..	20	8,594	..	..
Russian	72	121,805	..	..	..	..	..	..
Swedish and Norwegian ..	7	8,417	..	..	..	..	..	..
Turkish	227	121,211	..	..	49	4,845	172	18,060
Montenegran	..	..	..	..	1	192	..	..
Samian	..	..	..	..	86	1,812	..	..
Total	1,293	1,227,289	29	32,230	369	38,782	172	18,060

NOTE.—The above table does not include vessels that only called at the Vourlah Quarantine Station during the cholera epidemic, vessels under 30 tons, and the small coasting steamers that ply between Smyrna, Vourlah, and Aïvali.

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1894.

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UNITED STATES.

REPORT FOR THE YEAR 1893

ON THE

TRADE, &c., OF THE CONSULAR DISTRICT OF GALVESTON.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1164.

Presented to both Houses of Parliament by Command of Her Majesty,
APRIL, 1894.

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1330.	St. Petersburg	2½d.
1331.	Patras	1½d.
1332.	Calais	2½d.
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Reference to previous Report, Annual Series No. 1164.

UNITED STATES.

GALVESTON.

Mr. Consul Nugent to the Earl of Rosebery.

My Lord, *Galveston, February* 24, 1894.

I HAVE the honour to transmit herewith enclosed my Annual Report on the Trade and Commerce of my Consular District for the year 1893.

I have, &c.
(Signed) HORACE D. NUGENT.

Report on the Trade and Commerce of the Consular District of Galveston for the Year 1893.

ABSTRACT of Contents.

	PAGE
Texas—	
Introductory remarks	2
Imports	3
Exports	4
Shipping	5
Freights	5
Finances	6
Railroads	6
Wagon-bridge to mainland	7
Cotton business	7
Prices	7
Coal trade	8
Wheat trade	8
Vital statistics	8
Advantages of Galveston as a port	8
Public works on Texas coast	9
Galveston works	10
Major Miller's report	10
Contractor's statement	11
Details of the jetty construction	12
Ship channels in Galveston Bay	12
Other works by United States Government on Texas Coast	13
New Mexico—	
Legislation	15
Population	15

Abstract of Contents—continued.

	Page
Land court	15
Small holdings	16
Public surveys	16
Taxation	16
Public debt	16
Railroads	16
Stock-raising	16
Mines	16
Coal	16
Gypsum	16
Carbonate and sulphate of soda	17
Other minerals	17
Precious stones	17
Irrigation and agriculture	17
Sugar-beet	17
Canaigre	17

Introductory Remarks.

Introductory remarks.

The year 1893 has, without doubt, been the most disastrous in many ways that has been seen in the United States for nearly half a century. It is, however, doubtful whether Texas, an agricultural, not a manufacturing State, has suffered as much as many other parts of the Union.

The general feeling regarding the past year and that now before us has been ably voiced by that eloquent and keen American man of business, Mr. Chauncey Depew, who lately said as follows:—

"The year 1893 stands unique in its gloom, its disappointment, and its failure to give in any one of its months even a spasmodic promise of more hopeful and happy conditions.

"There has been no general bankruptcy of mills, factories, furnaces, or mines. The markets are becoming empty and need replenishing. The floors of the mills are swept clean of stock. As soon as it is decided in 1894 what will be the policy of the Government on the tariff there will be an immediate and universal resumption of business, especially if the country is not compelled to adjust its business to radical changes in the tariff.

"The enormous accumulation of unemployed capital will seek some avenue for investment and return, and that will give corresponding employment. Renewed business will furnish increasing traffic to the railways, both passenger and freight, and will improve their earnings.

"The year 1894 will certainly be an enormous improvement on 1893, because this country cannot be kept standing still nor the pace of its progress long diminished."

These words can be applied in a degree to Texas, but only in a degree, as the foreign export business, the business par excellence of Galveston and the State in general, has kept up to its yearly average.

Imports.

Imports. The total value of the merchandise imported into the port of Galveston during the year 1893 was 928,343 dol. as compared with 863,981 dol. in 1892, an increase of nearly 7 per cent., but showing a large decrease as compared with 1891 when the figures were 1,082,151 dol.

Of this amount of 928,343 dol., only 227,205 dol. figures as the value of imports paying duty; the remaining sum of 701,138 dol., representing goods imported free of duty. These figures compare respectively with 301,112 dol., and 562,869 dol. in 1892, thus showing that the direct trade in dutiable articles has decreased, owing probably to protection, while the business in merchandise imported free has largely increased.

Examining these figures by countries it will be found that the greater portion of the dutiable articles came from Great Britain, viz., 175,612 dol. out of a total of 227,205 dol. Imports of dutiable articles from Great Britain, however, show a decided falling-off, as in 1892 they amounted to 251,439 dol. and in 1891 to 383,924 dol. This falling-off can hardly be wondered at, taking into consideration the financial stringency of the past year and the present tariff conditions. The only other country from which dutiable articles were imported to any appreciable amount was Belgium, the figures being 31,596 dol. In short, the direct importation of dutiable merchandise into Galveston is, as compared with the large export business, a mere nothing.

Turning to the countries from which merchandise free of duty was imported, there is one article entering free that by far overshadows the rest, and that is sugar from Cuba. The value of this in 1893 was 621,186 dol., an entirely new line of trade, as in 1892 Cuba only exported to Galveston 45,743 dol. worth of sugar. In 1892 coffee to the value of 439,723 dol. was imported free of duty from Brazil, and in 1891 to the amount of 368,458 dol. In 1893, owing probably to the unsettled state of affairs in that Republic, none whatever has been shipped here. Had the normal state of trade in Brazil continued, the total value of imports free of duty in 1893 would, it cannot be doubted, have been half as great again.

But one other article of any importance is given in the table as entering free and that is jute butts from British India. Their value was 41,903 dol.

As regards the values of the chief imports from Great Britain, cement has decreased from 51,701 dol. to 43,072 dol., crockery has increased from 11,903 dol. to 20,524 dol., sheep dips have decreased from 57,990 dol. to 2,375 dol. only, burlaps have decreased from 16,485 dol. to 12,790 dol., tin and terne-plate have increased from 16,483 dol. to 25,481 dol., malt liquors have decreased from 24,366 dol. to 18,590 dol., coal and coke decreased from 13,548 dol. to 2,114 dol., dead oil has decreased from 16,818 dol. to 14,720 dol., salt has decreased from 15,800 dol. to 10,489 dol. The total imports from Great Britain, both of free and dutiable

goods, amounted to 201,961 dol. in 1893 as against 304,314 dol. in 1892 and 394,483 dol. in 1891. The imports from Germany and France in 1893 have decreased, those from Cuba (a new trade in sugar) largely increased, while those of coffee from Brazil, usually a large business, have been nil.

The trade in goods passing through Galveston in transit to Mexico has dwindled year by year until last year it amounted to only 63,060 dol. In 1892 it was 101,977 dol., in 1891, 371,273 dol., and in 1890, 766,653 dol.

Tables are annexed showing the imports in detail, as well as those in transit to Mexico.

Exports.

Exports.

The total value of commodities exported from the customs district of Galveston amounted in 1893 to 35,895,195 dol. as against 35,097,002 dol. in 1892 and 35,964,460 dol. in 1891, thus showing a steady keeping up to the average. Of this amount 2,155,903 dol. was exported from the new port of Velasco, 22,757 dol. from Sabine Pass, the remainder from Galveston.

The total exports of cotton were 757,593 bales, valued at 31,534,595 dol., as against 808,628 bales, valued at 32,610,901 dol., in 1892. Oil-cake and meal were exported to the amount of 118,230 tons, valued at 2,942,914 dol., as compared with 79,088 tons, value 1,867,441 dol., in 1892.

1,308,950 bushels of wheat, valued at 934,269 dol., were exported in 1893, as compared with 377,985 bushels, value 335,240 dol., in 1892.

Wheat flour was exported to the extent of 49,057 barrels, valued at 198,925 dol., as against 21,296 barrels, value 98,226 dol., in 1892. Cotton-seed oil was exported to the amount of 303,170 gallons, valued at 116,040 dol., as compared with 41,263 gallons, valued at 15,639 dol., in 1892.

Thus the exports of cotton have decreased, whilst those of the other chief commodities, cotton-seed, oil-cake, wheat, flour, and cotton-seed oil, have increased.

The total value of exports to Great Britain during 1893 amounted to 21,759,738 dol. as against 21,932,962 dol. in 1892, a very slight decrease. The exports of cotton were 497,478 bales, valued at 20,508,401 dol., as against 529,795 bales, valued at 21,008,705 dol., in 1892. Oil-cake, &c., was exported to Great Britain to the amount of 35,426 tons, valued at 900,920 dol., compared with 23,141 tons, value 549,599 dol., in 1892, a material increase in this branch of trade.

Wheat was exported to the extent of 433,160 bushels, valued at 296,443 dol., in 1893; in 1892 the figures were 377,685 bushels, value 335,001 dol.; wheat flour in 1893 shows 6,317 barrels, value 35,334 dol., as against 5,033 barrels, value 28,621 dol., in 1892.

The export trade to Germany occupies the second place in importance, and shows a slight increase in 1893 over 1892, the figures being 7,554,326 dol., as compared with 7,385,639 dol. Cotton exports decreased, whilst those of oil-cake, &c., increased. 248,905 bushels of wheat went to Germany, a new branch of trade.

The exports to France amounted to 4,760,050 dol. in 1893, as against 5,156,429 dol. in 1892.

Trade has been open with Holland, a new departure; exports to that country amounted to 861,807 dol. in 1893, being chiefly of cereals.

Detailed tables of the exports are annexed.

Shipping.

Shipping. The total number of vessels arriving at the port of Galveston during 1893 from other than American ports was 171 (tonnage 219,954), of which 133 (tonnage 193,032) were British. In addition there were 37 British vessels arriving coastwise, as well as the bi-weekly boats of the Mallory Line from New York, making, with small coasting vessels, some 400 vessels engaged in the trade of the port. Of these 400 no less than 170 were British, some 42½ per cent., and, excluding the Mallory Line and coasters, 83 per cent. The vessels arriving in ballast from abroad far out-number those bringing cargoes, being 133 as compared with 37. This disproportion has been growing rapidly of late years, owing to tariff restrictions and the opening of ports like Tampico, whereby much of the transit trade to Mexico has been lost to Galveston. Thus in 1890, 72 vessels arrived with cargoes; in 1891, 75; in 1892, 41; only 33 last year.

British shipping shows a satisfactory increase in point of average numbers as follows:—128 vessels in 1890, 174 in 1891 (owing to the phenomenal cotton crop), 154 in 1892, and 170 last year.

The British shipping at the new port of Velasco also shows a satisfactory increase, 24 vessels, 5 of them coming coastwise, having visited that place during 1893 as compared with 8 in 1892.

Thus the total British shipping for the district shows 194 in 1893, as against 162 in 1892, a gain of 20 per cent.

Tables showing the details of the shipping movement are annexed.

Freights.

Freights. The year 1893 opened with cotton freights as low or lower than ever before noted, viz, $\frac{7}{32}d.$ and $\frac{15}{64}d.$ per lb. to Liverpool, and $\frac{1}{64}d.$ higher to Havre and Bremen, whilst by the end of January as low as $\frac{3}{16}d.$ was paid on account of the small quantity of cotton offering. In February the Havre and Bremen rate was $\frac{15}{64}d.$, the same rate being paid for the few vessels in March, April,

and May to Liverpool, with a decline to $\frac{7}{32}d.$ at odd times, when the season ended.

Shipments commenced again in September at $\frac{1}{64}d.$, with the rates gradually rising till October, when $\frac{9}{32}d.$ was reached. By the end of that month they were $\frac{1}{64}d.$ and $\frac{5}{16}d.$, $\frac{1}{64}d.$ being about the average till the end of the year, declining at times to $\frac{9}{32}d.$ for steamers wanting prompt despatch.

Finances.

Finances.

The figures relating to the county and State finances are published about May, and only refer, at the latest, to the financial year ending August 31. In consequence I am unable to give any figures later than those of the last State report for 1891–92. From this it appears that the average rate of taxation for the support of county governments was 60½ c. per 100 dol. valuation in 1891.

The aggregate county bonded debt for the year ending December 31, 1891, was 8,411,541 dol., the floating debt 608,944 dol., making a total county indebtedness of 9,020,486 dol., an increase of 1,365,707 dol. over the previous year. The greater portion of this debt has been incurred for the construction of jails, court houses, bridges, &c. The aggregate of the balances in the several county treasuries on December 31, 1891, was 1,184,418 dol.

With regard to the State finances the data are of later date, dealing with the financial year 1891–92.

On August 31, 1892, there was a balance in the State Treasury of 1,332,253 dol. The bonded debt on that date amounted to 3,944,730 dol. The rate of taxation for State purposes is 15 c. on the 100 dol. valuation, and for public education 12½ c., a total State ad valorem tax of 27½ c. per 100 dol. By the constitution of the State, taxation for State purposes is limited to 35 c. per 100 dol. valuation. During the year commencing September 1, 1891, and ending August 31, 1892, a total of 2,554,521 dol. was disbursed for the support of the State Government.

Railroads.

Railroads.

At the close of 1892 there were 10,107 miles of completed railroad in Texas. During 1893 there were added to this 166 miles of new line (as compared with 211 miles added in 1892), making a total at present of 10,273 miles. The additions were made to the lines of 10 several companies. A proposed new line from Canada to the Gulf of Mexico is attracting considerable attention. The proposed line is to be nearly 1,500 miles long, and will pass through the great interior Basin, including North and South Dakota, Nebraska, Iowa, Kansas, Missouri, Oklahoma

territory, Indian territory, and Texas, having its southern terminus at Galveston. These States are recognised as the great grain and stock producing portions of the country, and a direct line such as it is proposed to build will reduce the distance to a deep-water port, as Galveston will almost certainly be ere long, by about 500 miles.

Wagon-bridge to Mainland.

Wagon-bridge to mainland.

During the past year a wagon-bridge has been built, connecting the island of Galveston with the mainland. Hitherto there has been no means of getting to and from Galveston except by rail, the lines being laid on trestles across the bay. The bridge, with approaches, is nearly 2 miles in length, and is stated to be one of the longest purely wagon bridges in the world. It is believed that by the building of this bridge, and the market thus offered to the farmers of the coast district on the mainland, not only a closer bond will be drawn between Galveston and her neighbours many miles inland, but that the settlement and cultivation of much land within easy reach of this town now lying idle and neglected, will be effected.

Vegetable and fruit farming, as I noted in my report for 1892, is a most paying industry here, provided there is a market for the produce.

The bridge was opened on November 15 last, and up to the new year nearly 5,000 teams had crossed it.

Cotton Business.

Cotton business.

The total amount of cotton receipts at Galveston during the season ending August 31, 1893, was 1,047,910 bales, of which 455,831 bales were shipped to Great Britain, 133,748 bales to France, 172,712 bales to Germany and the Continent, and 289,697 bales coastwise, chiefly to New York by the Mallory line.

Up to the date of writing (February 3, 1894) there have been received this season, *i.e.*, from September 1, 1893, 908,581 bales, of which 470,790 bales have been shipped to Great Britain, 85,725 bales to France, and 86,101 bales to the Continent. The coastwise shipments have been 138,464 bales to date, and the total exports 789,613 bales, as compared with 830,692 bales up to February 3, 1893. There is a stock of 88,688 bales awaiting shipment.

Prices.

Middling cotton at the beginning of 1893 was $9\frac{1}{2}$ c. It dropped to 9 c. on February 8, 1893; $8\frac{1}{8}$ c. on April 5; $7\frac{1}{2}$ c. on April 17; $7\frac{1}{4}$ c. on May 16; and touched its lowest point on August 22, when the price was $6\frac{3}{4}$ c.

The new season opened on September 1, 1893, with middling cotton at $7\frac{3}{8}$ c.; on September 14 it had risen to $8\frac{3}{16}$ c., and the price has remained under 8 c. since, falling as low as $7\frac{1}{8}$ c. on

December 27, 1893. The present quotation is 7⅞ c. Generally speaking, it may be said that prices have averaged nearly 1 c. lower this season than in that of 1892-93.

Coal Trade.

Coal trade.

The coal business between this port and Pensacola has risen from 5,000 tons a month a year ago to 10,000 tons a month this year, and is said to be increasing. One of the railways coming into Galveston found it advantageous a short time ago to contract for 50,000 tons to be delivered here. In consequence of the increasing business a coal elevator is in course of construction in Galveston, with a handling capacity of 600 tons a day, loading directly into railway cars, and with storage bins holding 4,000 tons.

Wheat Trade.

Wheat trade.

In my report for 1892 I alluded to the surprising development of the export grain trade here. The figures for 1893 do not belie the predicted increase in business, as 1,308,950 bushels were exported, as against 377,985 bushels in 1892. Should the proposed railway from north to south, alluded to in another portion of this report, be successfully carried out, there is hardly any doubt but that Galveston will develop into a great grain-exporting port, even as the harbour now exists. If the deep water, so hopefully looked for, should in the course of a year or two enable grain-carrying vessels to receive an entire cargo at the wharf, the possibilities of the business are immense. It is alleged that wheat shipped from Gulf ports spoils in transit, owing to the warmth of the Gulf Stream: but experts here deny this statement, attributing any damage en route to careless loading, and not to the supposed effect of the Gulf Stream.

Vital Statistics.

Vital statistics.

590 deaths were recorded in Galveston during 1893, compared with 743 in 1892, a decrease of 153. This gives a rate of 13·25 per 1,000, based on a supposed population of about 45,000.

There were no epidemics during the year, the chief causes of death being consumption, 64; heart disease, 37; pneumonia, 30; and Bright's disease, 24. There were 62 children stillborn, 19 violent deaths, and 9 suicides. No birth rates are kept, so it is impossible to give accurately the increase of population, but that it is increasing is undoubted.

Advantage of Galveston as a Port.

Advantage of Galveston as a port.

Before entering into the details of what has been done during 1893, in respect of carrying towards completion the works in

Galveston Harbour for obtaining deep water on the bar, a few remarks upon the advantages that it is supposed Galveston would offer to importers, as well as exporters, should the so-called deep water become a fact, may be appropriate.

Galveston is situated some 40 miles east of the geographical centre of the United States, making therefore the centre of the country nearly 50 per cent. nearer tidal water viâ Galveston than viâ New York; that is to say, half the territory of the United States is nearer Galveston than any other port east of this place. In 1860, 14·42 per cent. of the population only was west of Mississippi; in 1870, 17·84 per cent.; in 1890, 22·45 per cent. At this rate of increase compared with the east, by the year 1950, population would be divided equally east and west.

Maize products.

In the principal surplus-producing States east of the Mississippi, the yield of maize was, in 1889, 454,734,000 bushels; while west of the river it was 958,858,000 bushels, having increased 100 per cent. since 1879.

Wheat products.

The amount of wheat raised in the principal surplus-producing States, east of the Mississippi in 1890, was 96,344,000 bushels; whilst west of the river it was 158,926,000 bushels.

Cotton.

Galveston is the second largest cotton export port in the Union, and Texas the first State in the amount of cotton raised, first in number of cattle, first in number of sheep, and first in number of horses and mules.

Of the exports of the United States in 1890, the following agricultural products comprised the percentages given of the whole:—Raw cotton, 29·69 per cent.; bread-stuffs, 18·33 per cent.; provisions, meat, and dairy, 16·12 per cent.

Railroads.

There are further ample railroad facilities into Galveston. At Houston, 50 miles north of this port, there centre, directly or indirectly, all the lines in the south-west which are west of the Mississippi. In addition, it is proposed to build a new line from the Canadian border direct to Galveston, which will, it is said, tap all the States of the Great Central Basin.

The foregoing figures are taken from an elaborate letter on the advantages of Galveston as a port for direct transportation, that appeared in a local journal some little while ago, and are set forth by a practical man. The figures were stated to be extracted from United States Census Returns.

Even allowing somewhat for the natural prejudices of a local business man interested in the prosperity of Galveston, it must be admitted by the unbiassed observer, that, with such a country back of it to draw upon, Galveston, the most western port east of the Pacific, needs but the fulfilment of the promised deep water to become a formidable rival of New Orleans, and a port whose importance cannot be easily estimated at present.

Public Works.

Public works on Texas coast.

The various harbour improvements undertaken by the United States Government in Texas being of so much importance to this

section of the country, and those at Galveston particularly so, I have dwelt more at length on them in this report than has hitherto been the case. I am further led to do this as, should the present rate of progress on the jetty work here continue, the beneficial effects of what has been accomplished will be felt sooner probably than anticipated. The question has always been acknowledged to be one affecting the vital interests and progress of Galveston, and as a natural consequence the interests of Great Britain, especially as regards shipping and the export of the natural products of Texas and the country back of that State.

Galveston harbour works.

Major Miller, of the United States Engineers, who is in charge of the work at Galveston, in his last report for the year ending June 30, 1893, states as follows:—

Major Miller's report.

The obstructions to deep water navigation at this harbour have been the outer and inner bars. On the former the natural depth was 12 feet and on the latter about 13 feet, both at mean low tide.

The present project for improvement at this locality was adopted in 1874, modified in 1880, and again modified in 1886, the object being to deepen the channels so as to admit sea-going vessels of the deepest draft. The projects prior to 1874 related to dredging operations on a small scale.

The projects of 1874 and 1880 contemplated construction of jetties to deepen the channels on the bars; the former with a view to a depth of 18 feet. The modification of 1886 was with a view to a possible depth of 30 feet by means of jetties to be supplemented if need be by dredging. These jetties to be of rock, and to be built to a height of 5 feet above mean low tide. The cost of the modification of 1886, the present project, was estimated at 7,000,000 dol.

The total amount expended under the foregoing plans to include June 30, 1892, was 2,712,843 dol. 53 c., in addition to which there was expended 100,000 dol., subscribed by the City of Galveston in 1883. It resulted in a depth of 13¼ feet in the channel on the outer bar at mean low tide, and a depth of 21 feet where the inner bar was.

The expenditure during the past fiscal year of 646,796 dol. 29 c. has resulted in obtaining 14 feet on the outer bar and 23 feet where the inner bar was, an increase in depth of ¾ foot and 2 feet respectively.

The work during the past fiscal year has consisted in extending the south jetty 8,000 feet, and building an apron 839 feet long at the sea end which completes this jetty for the present. Work on the north jetty was commenced in April, 1893; 1,500 feet was completed and 2,100 feet was partially completed. The total of work done since operations began in 1887 is represented by 32,829 feet of south jetty, of which 32,000 feet is completed and 829 feet uncompleted, and 3,600 feet of north jetty, of which 1,500 feet is completed and 2,100 feet uncompleted.

The appropriation asked for the fiscal year ending June 30, 1895, is to be applied to the extension of the north jetty and necessary repairs to the south jetty.

Description.	Amount.	
	Dol. c.	Dol. c.
July 1, 1892, balance unexpended	..	665,156 47
July 14, 1892, repayment of account of compromise in suit of J. H. Mooney, et al. ..	..	118 00
Amount appropriated by sundry, Civil Act, approved August 5, 1892	..	450,000 00
Amount appropriated by sundry, Civil Act, approved March 3, 1893	..	1,000,000 00
	..	2,115,274 47
June 30, 1893, amount expended during fiscal year	..	646,796 29
July 1, 1893, balance unexpended	..	1,468,478 18
July 1, 1893, outstanding liabilities	32,138 97	
July 1, 1893, amount covered by uncompleted contracts..	1,328,104 33	
		1,360,243 30
July 1, 1893, balance available	..	108,234 88
Amount estimated required for completion of existing project	..	3,650,000 00
Amount that can be profitably expended in fiscal year ending June 30, 1895 ..	..	1,000,000 00

These figures relate to the fiscal year ending June 30, 1893. Some later figures, many of them very interesting, have been furnished by the contractors from which I extract the following:— Contractor's statement.

South Jetty.—The present contract began at the 19,400 foot mark, and the stone work was carried out to the 32,800 foot mark, practically completing the south jetty. 203,737 tons of rip-rap and 122,998 tons of granite were used, a total of 326,735 tons of stone.

North Jetty.—Work was commenced in April, 1893. Up to the end of the year the stone placed in the north jetty was as follows:—139,885 tons of rip-rap and 46,480 tons of granite, total 186,365 tons.

Total for both jetties under the present contractors from August 1, 1891, to December 31, 1893, rip-rap, 343,622 tons, granite, 163,478 tons, grand total of both, 507,100 tons.

This represents 7,995,133 cubic feet and would cover a little over 330 acres with stone 1 foot deep. It would pave 715,612 feet of streets, 6 inches thick and 40 feet wide, $132\frac{2}{10}$ miles. On January 1, 1894, the north jetty was out to the 11,600 foot mark in 17 feet of water; of this, 7,200 feet were completed with granite topping. The proposed total length is 24,000 feet, with 7,000 feet opening between the jetties. It is estimated that when another 5,000 feet of jetty is built, the spread of the current will be controlled, and the only outlet for it will be across the bar. Then it is confidently expected the beneficial results of the jetties will begin to be felt. At the present rate of the work these 5,000 feet should be completed by June or July, and it is hopefully predicted by some that there will be 20 feet of water

on the outer bar at mean low tide by the commencement of next cotton season, September 1, 1894.

Details of the jetty construction.

Through the kindness of Major Miller I am enabled to furnish a diagram showing very clearly the method of construction of the jetties. The trestle for the support of the contractors' railroad is first built; second, an "apron" of rip-rap stone about 3 feet thick and not less than 30 feet wide; third, an embankment of rip-rap, 10 feet wide on top; and fourth, a protection of granite blocks 12 feet to 15 feet wide on top. These granite blocks are to be as much as possible cubical, and are fitted into each other as nearly as can be done without the use of mortar. They are not less than 1 ton each in weight for the first mile, 2 tons for the second mile, 5 tons from thence to the crest of the bar, and 10 tons for any extension beyond that point that it may be deemed necessary to make. The slope of the outer angle is about 2 upon 3, from a top of 12 feet to 15 feet; for example, with a 12 feet top 5 feet above mean low tide, the base, in 17 feet of water (where the work is at the date of writing, February 14), is about 66 feet. The deeper the water the broader the base.

Ship-channel in Galveston Bay.

In addition to the works for the removal of the bars in Galveston Harbour, other improvements are in course of completion here by the United States Government, under the supervision of Major Miller. The most important is that on the ship-channel in Galveston Bay. Major Miller reports as follows:—

This is a channel dredged by the United States Government from Bolivar Channel to Morgan Cut, the latter terminating at a point 4·8 miles from Morgan Canal, an excavation across Morgan Point at the mouth of the San Jacinto River. Morgan Cut and Canal were formerly the property of the Buffalo Bayou Ship Channel Company, but were purchased by the United States, and the transfer was made May 4, 1892.

The natural depth on line of Galveston Bay Ship-channel averaged 8½ feet at mean low tide, with a depth in some places of but 7 feet; the ruling depth in Morgan Cut was 7½ feet, and in the canal 17 feet.

The project for this improvement was adopted in 1871, modified in 1877, and again modified in 1892. The latter modification became necessary owing to the acquisition by the United States of the Morgan Cut and Canal. The object of the improvement is to excavate and maintain a channel 100 feet wide at the bottom and 12 feet deep, from Bolivar Channel to the San Jacinto River, a distance of 24·33 miles, thereby giving an outlet to the commerce of Buffalo Bayou, of San Jacinto River, of Trinity River, and of Cedar Bayou.

A channel, having a least width of 100 feet and a depth of 12 feet, was excavated from Bolivar Channel to Morgan Cut in 1888 and 1889, this being the first work that was done since operations were suspended in 1883.

No dredging was done from July, 1889, to the end of the last fiscal year; consequently, the channel shoaled to an average depth of 8 feet.

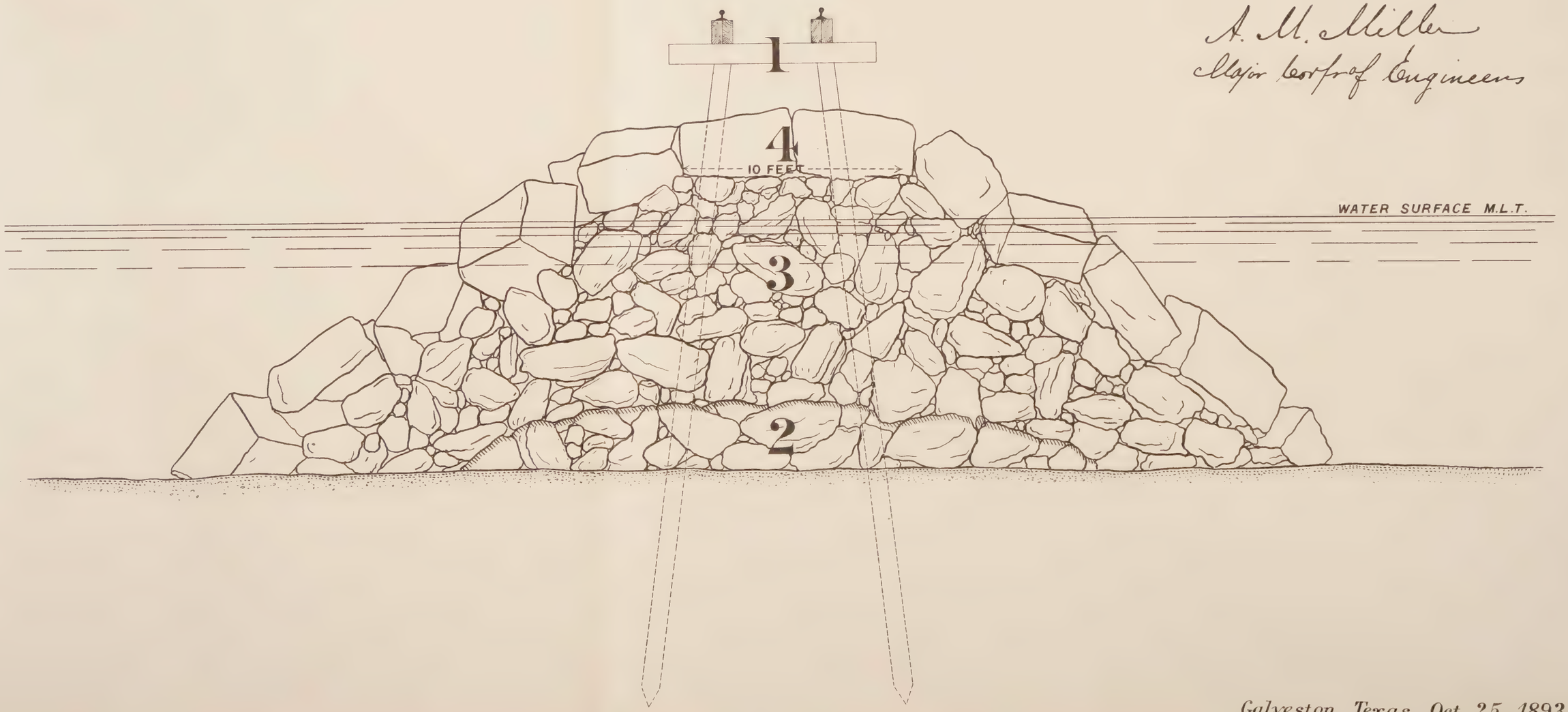
GALVESTON HARBOUR IMPROVEMENT,

NORTH JETTY.

SCALE, 1 INCH 5 FEET

ORDER OF CONSTRUCTION.

1st. *Trestle, with Railway of Standard gauge.*
2nd. *Riprap Apron, about 3 feet thick and at least 30 feet wide.*
3rd. *Completed Embankment of Riprap, 10 feet wide on top.*
4th. *Block protection 12 to 15 feet wide on top.*



A. M. Miller
Major Corps of Engineers

Galveston, Texas, Oct. 25. 1893.

GALVESTON HARBOUR, TEXAS.

FROM SURVEY MADE UNDER THE DIRECTION OF

MAJ. A. M. MILLER, CORPS OF ENGRS., U.S.A.,

BY

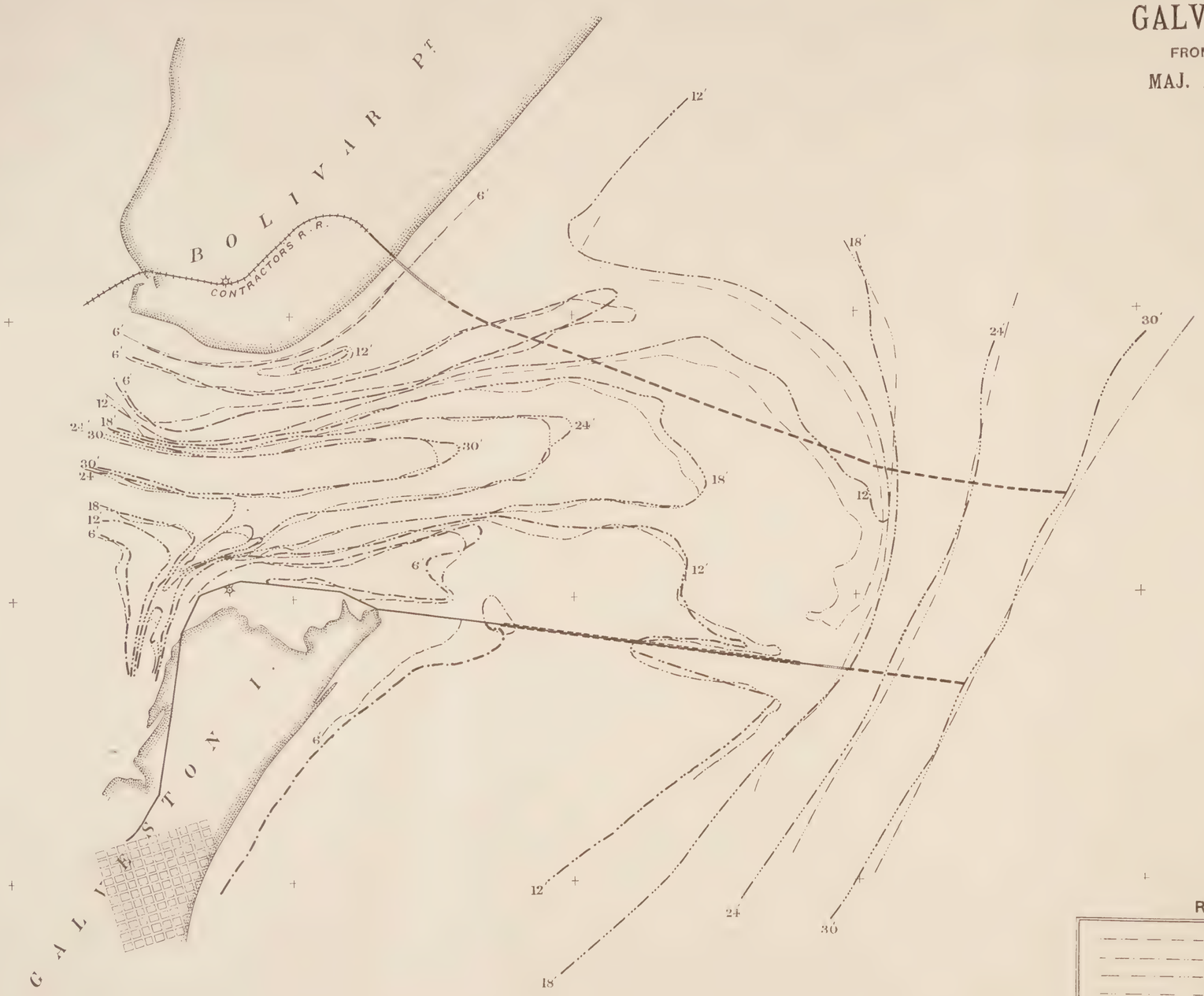
E. M. HARTRICK, ASSIST. ENGR.,

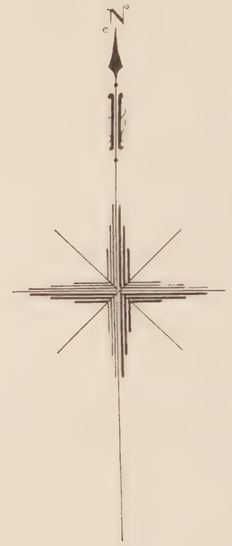
AND

F. OPPIKOFER, ASSIST. ENGR.,

IN MAY AND JUNE, 1893.

Scale $\frac{1}{50,000}$





REFERENCE

- 6 FEET DEPTH JUNE 1892
- 12 ,, ,, ,, ,,
- 18 ,, ,, ,, ,,
- 24 ,, ,, ,, ,,
- 30 ,, ,, ,, ,,
- 6 ,, ,, ,, 1893
- 12 ,, ,, ,, ,,
- 18 ,, ,, ,, ,,
- 24 ,, ,, ,, ,,
- 30 ,, ,, ,, ,,
- JETTY COMPLETE
- ,, INCOMPLETE
- PROPOSED EXTENSION

(1325.4/94.1698.28.)

Harrison & Sons Lith. St. Martins Lane W.C.

The amount expended to June 30, 1892, on this improvement was 540,831 dol. 16 c., and during the fiscal year ending June 30, 1893, the sum of 16,484 dol. 64 c. was expended in sloping the banks at Morgan Canal, which required the removal of 12,550 cubic yards of material, and in completing the revetment on the west bank of the canal, the length constructed being 1,959 linear feet. This work prevented further erosion of the banks of the canal. No dredging was done, the contractor's plant having met with an accident while en route to Galveston, and repairs were not completed at the close of the fiscal year. There was no change in channel depths from those previously reported.

The project is not capable of permanent completion, it being estimated that the sum of 100,000 dol. will be required annually to maintain the channel after it has been fully excavated to the required width and depth.

Description.	Amount.	
	Dol. c.	Dol. c.
July 1, 1892, balance unexpended	..	45,668 84
Amount appropriated by Act approved July 13, 1892	..	40,000 0
		85,668 84
June 30, 1893, amount expended during fiscal year	..	16,484 64
July 1, 1893, balance unexpended	..	69,184 20
July 1, 1893, outstanding liabilities	851 79	
July 1, 1893, amount covered by uncompleted contracts	55,200 0	
		56,051 79
July 1, 1893, balance available	..	13,132 41
Amount (estimated) required for completion of existing project	..	269,675 44
Amount that can be profitably expended in fiscal year ending June 30, 1895	..	200,000 0

In order to make these proposed improvements clearer to the general public, I have thought it well to include a sketch map of the entrance to Galveston Bay, kindly given me by Major Miller, U.S.A., in charge of the Survey, showing the jetty works marked on it.

Other works by United States Government on Texas coast.

Besides the works in Galveston Harbour, other harbour and river improvements are in progress in various portions of Texas, all undertaken by the Federal Government and supervised by United States engineer officers. These works are at Sabine Pass, Sabine River, Neches River, Sabine Lake, Cedar Bayou, Trinity River, Buffalo Bayou, and Brazos Santiago. Of these the most important are at Sabine Pass, the great lumber exporting port of Texas. The United States officer in charge there makes the following report:—

Originally there was scarcely 6 feet of water on the bar at the entrance to Sabine Pass, and as the bar was composed of very soft mud all efforts to maintain a channel through it of 12 feet or 16 feet depth by dredging were unavailing.

In 1882 a project for the improvement of this entrance was approved. It provided for the construction of jetties on either side of a channel connecting the deep water of the pass with that of the gulf.

The estimated cost of this improvement was 3,177,606 dol. 50 c.

Since the approval of this project there has been appropriated 1,448,750 dol. A total of 1,319,848 dol. 48 c. had been expended to June 30, 1892, of which sum 999,848 dol. 48 c. was expended under the present project.

The east jetty has a total length of 17,100 feet, 16,650 feet of which has been raised to 2 feet above mean high water. The outer 450 feet is foundation work only.

The west jetty has now a length of 12,840 feet, 6,609 feet of which has been raised to 2 feet above mean high water, and the remainder is only built to mean low water and is incomplete.

In the beginning the jetties were built of alternate layers of brush and stone, but the rapid disappearance of the brush led to the adoption of the present method, which is, first to lay a brush mat and then build a rip-rap structure on this, reaching 2 feet above mean high water.

The material between the jetties is not easily eroded by the currents, and accordingly dredging has been resorted to to expedite the deepening. At present a dredged channel 16 feet in depth extends through the centre of the channel span to within 1,500 feet of the end of the east jetty. This channel would have been extended clear through to the 16-foot curve of depth in the gulf if unfavourable weather had not prevented.

A considerable deepening of the channel has occurred from natural scour, and the manner in which this material has been carried clear of the entrance confirms the belief that a channel dredged beyond the extremities of the jetties will not be obliterated for some time.

At mean low water there is now an unobstructed channel into the pass of over 11 feet. Vessels, however, enter and leave safely drawing 2 feet more than this, owing to the very soft material composing the bar.

Description.	Amount.	
	Dol. c.	Dol. c.
The amount expended on this work during the year ending June 30, 1893, was	..	208,745 31
July 1, 1892, balance unexpended	..	98,901 52
Amount appropriated by Act approved July 13, 1892	..	350,000 0
		448,901 52
June 30, 1893, amount expended during fiscal year	..	208,745 31
July 1, 1893, balance unexpended	..	240,156 21
July 1, 1893, outstanding liabilities	42,411 54	
July 1, 1893, amount covered by uncompleted contracts..	171,975 48	
		214,387 2
July 1, 1893, balance available	..	25,769 19
Amount (estimated) required for completion of existing project..	..	1,728,856 50
Amount that can be profitably expended in fiscal year ending June 30, 1895	..	1,000,000 0

New Mexico.

Legislation.

The last legislature passed a very important law for the well being of New Mexico. It provides for a county court in every county where the county seat has a population of 2,000 persons or more; this court to be a court of record and to have exclusive jurisdiction in all civil suits brought in the county, excepting chancery cases, where the sum involved does not exceed 300 dol. The court is also to have concurrent jurisdiction with all justices of the peace in civil and criminal cases.

As the organic Act creating the territory of New Mexico only provided for supreme, district, probate and justices' courts, this new tribunal is expected to fill a long felt want.

Population.

During 1893 no material change took place in population. The only appreciable increase by way of immigration has been in localities favourable to irrigation enterprises. In land covered by the Pecos Irrigation Company's ditches, also in the Maxwell Grant and in San Juan County, there has been an influx of very desirable people, chiefly from the Eastern States and the best class of European immigrants.

Land court.

The work of the United States court of private land claims continues to give great satisfaction. No Act of Congress for many years has effected, it is said, so important an advance towards the permanent well-being of New Mexico as the Act constituting this court.

Clouded titles and insecure tenure of land were frequent in New Mexico, creating a great barrier to permanent settlement. But now that the land court is in operation, these obstacles

towards advance will soon be swept away. The court is busily engaged in sifting grants, establishing valid titles to just grants, and restoring to the public domain large areas improperly claimed.

Small holdings. The amendment to the Act creating the land court vests in the Surveyor-General of the territory the power to confirm title to tracts less than 160 acres, held under a title of possession for more than 20 years. 2,160 claims have been filed under this provision.

Public surveys. During the year ended June 30, 1893, 2,343 miles of Government lines were surveyed and established, 376 plats were made and 95 mineral locations surveyed.

Taxation. The last legislature passed an Act exempting from taxation 200 dol. worth of property when owned by the head of a family. The privilege thus granted has been greatly abused, it is said, and in consequence the value of taxable property will be greatly reduced.

The assessed valuation of property in the territory in 1892 was 41,602,198 dol., as compared with 45,329,563 in 1891.

Public debt. The public debt of New Mexico on August 29, 1893, was 911,712 dol. 12 c., as compared with 864,806 dol. 12 c. in March, 1892.

The public expenditure during the forty-third fiscal year was 234,851 dol., and on June 30, 1893, there remained a cash balance in the Treasury of 121,000 dol.

Railroads. The Pecos Valley Railroad has been completed 97 miles from Pecos City, Texas, to Eddy, New Mexico, and is in process of construction from that point to Roswell and beyond. During the next 2 years a junction will be effected with the Santa Fé route.

Beyond this there has not been, nor is there contemplated at present, any railroad construction in the territory. The proposed extension, however, is extremely important as it will form the shortest inter-oceanic route in the United States.

Stock raising. Four years' continuous drought of previously unknown severity have greatly decreased stocks interests. During last summer, however, abundant rain fell all over New Mexico for the first time in 5 years. It is hoped that the stock-raising interests will now look up once more.

Mines. The decrease in the value of silver and lead and the great stringency of the money market acted prejudicially in respect of the mining industry in 1893, and in consequence many mines were closed.

Coal. During the year 1893, there were mined at Gallup, 292,650 tons of coal; at Blosburg and Raton, 244,955 tons; at Cerillos, 18,747 tons; at Monera, 20,000 tons; and at Carthage, 49,529 tons. The works at Cerillos are being largely increased, and before the end of 1893 were estimated to produce 1,000 tons of bituminous coal per day and 5,000 tons of anthracite per month.

Gypsum. Large deposits of this mineral are found in New Mexico. In Dona Ana County there exists probably the largest deposit of gypsum in the world, and of exceedingly pure character. The bed of gypsum begins near the southern end of a small salt lake

in San Augustine plain near White Oaks, and extends down the centre of the plain almost without a break for 50 miles. It varies from 5 miles to 20 miles in width and is white and granulated.

Carbonate and sulphate of soda.

In what is apparently the bed of an ancient lake or river near the deposit of gypsum above alluded to, is a deposit of carbonate and sulphate of soda, containing about 15 per cent. of carbonate of soda, 20 per cent. of sulphate of soda, and 4 per cent. of borax. The deposit is about 1 mile wide, 5 miles long, and unknown in depth.

Other minerals.

Kaolin and fire-clays are found extensively in several parts of the territory; also graphite.

A large deposit of alum, too, has been found on the Gila River.

Precious stones.

Some precious stones of considerable value are found in New Mexico, though I am unable to give any figures. Among those chiefly found are emeralds; a stone resembling the ruby, with which are frequently found peridots and garnets; turquoises; so-called Montana sapphires; opals; and a great variety of fine agates.

Irrigation and agriculture.

As a general rule agriculture is only successful in New Mexico where irrigation is carried on. Only in isolated instances can crops be grown without it. Large areas consist of extensive plains and bottom lands to which water is easily conducted by open ditches. These areas lie along either side of the rivers traversing the territory, and are, generally speaking, very fertile and adapted to the growth of every variety of grass, fruit, and vines that flourish in the temperate zone. By using the storm waters and the immense natural flow of the streams that pour down from the snow capped mountains in spring and early summer, many thousands of acres of land can be successfully irrigated and changed from arid waste to productive farms. Irrigation prospects, so far as they can be advanced by private enterprise, and so far as sure profit on investment is concerned, are very promising. Serious attention is being given, in consequence, to the cultivation of new products, specially adapted to the soil and climate, such as sugar beets and canaigre.

Sugar beet.

The sugar beetroot grown in New Mexico shows the highest general average of purity, percentage of solid matter, and of sugar of any State or territory of the United States.

Canaigre.

Canaigre is a tanning agent. It is a species of sour dock, and the dried root contains about 33⅓ per cent. of tannic acid, or a higher average than the very best oak bark. It grows wild on most of the New Mexican plains or "mesas," and in that state yields from 1 ton to 4 tons to the acre, and in rare instances, 5 tons. Under very simple cultivation and scanty irrigation the yield is at least 10 tons per acre, and it will average 10 tons to 20 tons. The United States experiment station attached to the Agricultural College at La Cruces has two fields planted now, one irrigated, the other dry. The habits and evolution of this plant from the wild to the cultivated state are being closely watched and recorded. At Deming, extracting works have been

erected, and the product is being shipped to several tanneries in the United States and England.

In the matter of irrigation development the Pecos Valley enterprise boasts of the best and most extensive system of irrigation extant in America. Five years ago this great valley was a barren plain occupied by half-a-dozen cattle raisers. To-day it is one of the most promising farming regions of the West, with a population of over 17,000 souls. The capacity of the storage system, projected and now nearly completed, to save the flood and storm waters, aggregates over 15,000,000,000 cubic feet. The canals cover over 500,000 acres.

Besides the Pecos Valley enterprise, other important works of a like nature are in progress. In Grant County two, to save the overflow of the Mimbres River, are well under way. The irrigation works on the Maxwell Grant have been completed, while in San Juan County, where the farmers themselves own nine-tenths of the canals, the improvement is steady and continuous. A company has been formed, known as the Valverde Land and Irrigation Company, for the purpose of reclaiming the Armendarie grants, which consist of 447,535 acres of pastoral and coal lands, situated on either side of the Rio Grande.

The splendid results achieved by the Pecos Valley Irrigation and Improvement Company have given a new impetus to irrigation by showing the cheapness and feasibility of such works, and the short time required to change a desert into grain fields and vineyards, as well as the profit to be realised. Land, which less than five years ago was purchased for 1 dol. 25 c. per acre, has been sold recently and is now selling for 50 dol. and even 75 dol. per acre.

Governor Thornton, in his report for 1893, to which I am indebted for all the information given by me, says, in making a strong plea for governmental aid to irrigation:—"The future prosperity of the territory and its ability to support a dense population depends almost entirely upon the extent to which irrigation may be successfully carried. The efforts of the past have shown the wonderful productiveness of the soil after reclamation, and present efforts are proving the large acreage susceptible of irrigation at a very small expenditure of capital."

. . . . . .

"With a soil as rich as that found in any portion of the world, adapted to the growth of every variety of grain, vegetables, vine, and fruit produced in the temperate zone, a climate unsurpassed, it would seem that the American desert might, with sufficient capital and effort for the saving and utilising of the flood waters of summer and the melted snows of winter, be in time made the garden of America, the home of a larger population than now inhabits the fertile valleys of the Mississippi and its tributary streams. Under present conditions the utilisation of these waters is impracticable by private effort. . . . The time has arrived when this policy should be extended to a reclamation by the general Government of the large bodies of arid lands situated in the great West."

Annex A.—TABLE showing Principal Articles of Import, with Countries of Origin, at the Port of Galveston, Texas, for the Year ending December 31, 1893, subject to Duty.

Articles.		Quantity.	Germany.	Great Britain.	France.	Netherlands.	Mexico.	Porto Rico.	Turkey.	Spain.
			Dol.	Dol.	Dol.	Dol.	Dol.	Dol.	Dol.	Dol.
Cement (barrels of 400 lbs. gross)	Lbs.	65,746	4,902	43,072	..	3,397	..	..	..	..
Coal, bituminous	Tons	709	..	2,114	..	..	..	..	..	..
Chemicals—all other	..	..	..	..	..	..	..	..	..	..
Caustic soda	Lbs.	98,959	..	2,274	..	..	..	..	..	..
Soda ash	„	224,160	..	2,800	..	..	..	..	..	..
Sheep dip	..	..	..	2,375	..	..	..	..	..	..
Dead oil, creosote	..	..	..	14,720	..	..	..	..	..	..
Books, paper, and all printed matter	..	..	16	350	7	..	..	..	..	..
Cotton, manufactures of	..	..	..	697	..	..	..	..	..	..
Crockeryware, plain and decorated	..	..	19	20,524	58	..	..	..	..	..
Firebrick	Tons	343	..	948	..	..	..	..	..	..
Tiles, paving	..	..	..	1,098	..	..	..	..	..	..
Flax and linen, manufactures of	..	..	5	441	..	..	..	..	..	..
Burlap, manufactures of jute	..	..	..	12,790	..	..	..	..	..	..
Fruits, green and ripe	..	..	..	..	..	..	264	..	..	..
Fish in oil, sardines in ¼ lb. tins	..	..	..	..	1,825	..	..	..	..	..
Glass, window, common	Lbs.	135,700	..	..	..	..	..	..	..	..
„ manufactures of, including bottles	..	..	11	40	263	153	..	..	..	..
Tin and terne plate	Lbs.	647,917	..	25,481	..	..	..	..	..	..
Pig-iron	Tons	75	..	964	..	..	..	..	..	..
Ale and porter, in bottles	Gallons	19,169	..	13,590	..	..	..	..	..	..
Spirits, distilled	„	496	..	551	261	..	..	..	..	-
Wine, in wood	„	3,614	..	117	2,179	..	..	..	..	..

TABLE showing Principal Articles of Import, with Countries of Origin, at the Port of Galveston, Texas, for the Year ending December 31, 1893, subject to Duty—continued.

Articles.		Quantity.	Germany.	Great Britain	France	Netherlands	Mexico.	Porto Rico.	Turkey	Spain.
			Dol	Dol.	Dol.	Dol.	Dol.	Dol.	Dol	Dol.
Wine, in cases, including sparkling	Dozens	210	111	93	678	..	..	..	..	..
Salt, in bags, coarse and fine	Lbs	5,593,084	..	10,489	..	..	..	..	..	..
Machinery, all kinds	..	..	..	7,857	..	..	..	..	..	..
Fruits, preserved	..	..	2	52	719	..	..	..	..	..
Vegetables, preserved, prepared	..	..	..	1,483	39	..	..	..	..	..
Olive oil	Gallons	939	..	..	..	..	..	..	..	..
Manufactured metals, all kinds	..	..	..	3,174	..	..	..	..	..	..
Toys, all kinds	..	..	567	..	..	..	..	..	..	..
Paper, manufactures of	..	..	111	685	..	..	..	..	..	..
Paints	Lbs.	5,694	188	..	..	..	..	..	..	..
Wood, manufactures of, including wood furniture	..	..	56	732	77	..	..	..	..	..
Wool, manufactures of, including wool clothing	..	..	254	..	..	..	..	..	..	..
Marble, manufactures of	..	..	..	176	..	..	..	..	..	..
Silk, manufactures of	..	..	..	17	..	..	..	..	..	..
Musical instruments	..	..	379	..	..	..	..	..	..	..
All other dutiable articles	..	..	783	908	887	..	280	..	..	..
Subject to duty for 1893	..	..	7,407	175,612	6,993	3,550	541	..	..	..
Free of duty for 1893	..	..	1,616	26,349	100	522	6,055	3,180	..	..
Grand total for 1893	..	..	9,023	201,961	7,093	4,072	6,599	3,180	..	..
Grand total for 1892	..	..	11,318	304,314	13,144	27,[illegible]94	5,994	11,629	355	..
Grand total for 1891	..	..	77,488	394,483	18,023	42,148	44,657	163,403*	399	99

* Nicaragua

TABLE showing Principal Articles of Import, with Countries of Origin, at the Port of Galveston, Texas, for the Year ending December 31, 1893, subject to Duty—continued.

Articles.	Italy.	Brazil.	British West Indies.	Cuba.	British India.	Belgium.	Austria.	Total, 1893.	Total, 1892.
	Dol.	Dol.	Dol.	Dol.	Dol.	Dol.	Dol.	Dol.	Dol.
Cement (barrels of 400 lbs. gross)	..	..	..	..	..	27,712	..	79,088	78,922
Coal, bituminous	..	..	..	..	..	..	..	2,114	8,758
Chemicals—all other..	..	..	..	..	..	..	..	..	..
Caustic soda	..	..	..	..	..	..	..	2,274	3,862
Soda ash	..	..	..	..	..	..	..	2,800	3,599
Sheep dip	..	..	..	..	..	..	..	2,375	57,990
Dead oil, creosote	..	..	..	..	..	..	..	14,720	16,818
Books, paper, and all printed matter	..	..	..	..	..	..	..	373	1,225
Cotton, manufactures of	..	..	..	..	160	211	..	1,018	154
Crockeryware, plain and decorated..	..	..	..	..	..	..	..	20,601	12,114
Firebrick	..	..	..	..	..	..	..	948	2,233
Tiles, paving	..	..	..	..	..	.	..	1,098	..
Flax and linen, manufactures of	..	..	..	..	..	858	..	1,304	..
Burlap, manufactures of jute	..	..	..	..	..	..	..	12,790	16,483
Fruits, green and ripe	..	..	..	..	..	..	..	264	251
Fish in oil, sardines in ¼ lb tins	..	..	..	..	..	..	..	1,825	5,846
Glass, window, common	..	..	..	..	..	2,636	..	2,636	1,123
,, manufactures of, including bottles	..	..	..	..	..	162	..	629	1,157
Tin and terne plate	..	..	..	..	..	..	..	25,481	16,483
Pig-iron	..	..	..	..	..	.	..	964	793
Ale and porter, in bottles	..	..	..	..	..	..	..	18,590	24,366
Spirits, distilled	..	..	..	..	..	..	..	812	1,256
Wine, in wood	..	..	..	..	..	..	..	2,296	1,305

TABLE showing Principal Articles of Import, with Countries of Origin, at the Port of Galveston, Texas, for the Year ending December 31, 1893, subject to Duty—continued.

Articles.	Italy.	Brazil.	British West Indies.	Cuba.	British India.	Belgium.	Austria.	Total, 1893.	Total, 1892.
	Dol.	Dol.	Dol.	Dol.	Dol.	Dol.	Dol.	Dol.	Dol.
Wine, in casks, including sparkling	..	..	..	..	..	17	..	899	1,698
Salt, in bags, coarse and fine	..	..	..	..	..	..	..	10,489	16,319
Machinery all kinds	..	..	..	..	..	..	..	7,857	..
Fruits, preserved	..	..	..	..	..	..	..	773	3,655
Vegetables, preserved, prepared	..	..	..	..	..	..	..	1,522	1,892
Olive oil	968	..	..	..	..	..	123	1,091	482
Manufactured metals, all kinds	..	..	..	..	..	..	..	3,174	6,258
Toys, all kinds	..	..	..	..	..	..	..	567	..
Paper, manufactures of	..	..	..	..	..	..	..	799	..
Paints	..	..	..	..	..	..	..	188	..
Wood, manufactures of, including wood furniture	..	..	..	..	..	..	..	865	1,590
Wool, manufactures of, including wool clothing	..	..	..	..	..	..	..	254	680
Marble, manufactures of	..	..	..	..	..	..	..	176	..
Silk, manufactures of	..	..	..	..	27	..	..	44	..
Musical instruments	..	..	..	..	..	..	..	379	..
All other dutiable articles	..	..	..	..	225	..	..	3,083	13,825
Subject to duty for 1893	968	..	..	..	412	31,596	123	227,205	..
Free of duty for 1893	..	..	..	621,186	41,903	227	..	701,138	..
Grand total for 1893	968	..	..	621,186	42,315	31,823	123	928,343	..
Grand total for 1892	1,218	489,723	3,097	46,275	..	..	..	863,991	..
Grand total for 1891	75	329,442	432*	1,452	10,120†	..	..	1,082,151	..

* Japan. † British Columbia.

Annex B.—TABLE showing Principal Articles of Import, with Countries of Origin, at the Port of Galveston, Texas, for the Year ending December 31, 1893, Free of Duty.

Articles.		Quantity.	Value.						
			Germany.	Great Britain.	France.	Netherlands.	Mexico.	Porto Rico.	Turkey.
			Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.
Coffee	Lbs.	19,070	..	..	..	..	16	3,113	..
Sugar	,,	16,655,781	..	..	..	..	..	..	..
Jute butts	Tons	1,791	..	..	..	..	..	..	..
Asphaltum	,,	178	..	..	..	..	656	..	..
Fruits and nuts	..	..	..	..	..	..	337	67	..
American manufactures re-imported	..	..	..	12,450	..	..	..	..	..
Household, personal effects, and books	..	..	1,497	7,327	..	10	..	..	..
Coal, anthracite	Tons	1,732	..	5,059	..	..	..	..	..
Dyewood, fustic	..	..	..	..	..	..	879	..	..
Mineral water, natural	..	..	28	..	..	512	..	..	..
Cedar, in logs	..	..	..	..	..	..	4,074	..	..
Miscellaneous	..	..	91	1,513	100	..	93	..	..
Total for 1893	..	..	1,616	26,349	100	522	6,055	3,180	..
Total for 1892	..	..	2,003	52,875	725	4,730	3,477	10,857	..
Total for 1891	..	..	..	..	..	..	..	..	..

TABLE showing Principal Articles of Import, with Countries of Origin, at the Port of Galveston, Texas, for the Year ending December 31, 1893, Free of Duty—continued.

Articles	Value.							
	Spain.	Italy.	Brazil.	British West Indies.	Cuba.	British India.	Belgium.	Total.
	Dollars.	Dollars	Dollars.	Dollars.	Dollars	Dollars.	Dollars.	Dollars.
Coffee	..	.	..	..	..	..	..	3,129
Sugar	..	..	..	..	621,186	..	..	621,186
Jute butts	..	.	..	..	..	41,903	..	41,903
Asphaltum	..	..	..	..	..	..	..	656
Fruits and nuts	..	..	..	..	..	..	..	404
American manufactures re-imported	.	..	..	..	..	..	..	12,450
Household, personal effects and books	.	..	..	..	.	..	227	9,061
Coal, anthracite	..	.	..	..	..	..	..	5,059
Incense, Indian	..	..	..	..	..	..	..	879
Mineral water, natural	.	..	..	..	..	..	..	540
Cement, in bags	..	..	..	..	..	..	..	4,074
Miscellaneous	..	..	..	..	..	..	..	1,797
Total for 1893	.	..	..	..	621,186	41,903	227	701,188
Total for 1892	.	158	439,723	2,578	15,743	..	..	562,889
Total for 1891	..	..	..	.	..	..	..	557,981

Annex C.—STATEMENT of Merchandise Entered at the Port of Galveston, Texas, in Transit to United States of Mexico, from January 1, 1893, to December 31, 1893.

Where from	January.	February.	March.	April.	May.	June.	July.	August.	September.	October.	November.	December.	Total.
	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.
Belgium	...	...	...	...	...	...	...	...	...	...	...	...	...
England	12,703	...	13,420	...	...	...	...	...	...	16,774	13,235	6,928	63,060
France	...	...	...	...	...	...	...	...	...	...	...	...	...
Germany	...	...	...	...	...	...	...	...	...	...	...	...	...
Mexico	...	...	...	...	...	...	...	...	...	...	...	...	...
Total for 1893	12,703	...	13,420	...	...	...	...	...	...	16,774	13,235	6,928	63,060
Total for 1892	18,470	1,994	2,292	6,428	...	...	930	...	7,019	2,122	38,164	24,558	101,977
Total for 1891	41,053	73,589	26,132	3,468	299	56,085	21	33,304	38,236	17,274	44,551	37,261	371,273
Total for 1890	61,454	72,586	110,689	29,795	139,721	969	70,165	48,818	35,188	28,958	90,711	77,599	766,653

TRANSPORTED into the United States of Mexico, viâ the following Frontier Ports in Texas and Arizona.

Brownsville, Texas	294	...	...	...	...	...	...	...	...	...	...	...	294
Eagle Pass, Texas	...	...	1,532	...	...	...	...	...	...	144	1,269	570	3,515
El Paso, Texas	...	...	...	...	...	...	...	...	...	472	...	...	472
Laredo, Texas	7,831	...	10,953	...	...	...	...	...	...	13,007	9,829	4,614	46,234
Nogales, Arizona	4,578	...	935	...	...	...	...	...	...	3,151	2,137	1,744	12,545
Total for 1893	12,703	...	13,420	...	...	...	...	...	...	16,774	13,235	6,928	63,060

Annex D. STATEMENT of Exports of Commodities of Domestic Manufacture and Growth from the Customs District of Galveston for the Year ending December 31, 1893.

Destination	Cotton.		Oilcake, &c.		Wheat.		Corn.	
	Quantity.	Value	Quantity.	Value	Quantity.	Value	Quantity	Value
	Bales	Dollars.	Tons (of 2,240 lbs.)	Dollars.	Bushels.	Dollars.	Bushels.	Dollars.
GREAT BRITAIN.								
From Port of Galveston	489,859	29,107,849	28,626	742,694	433,160	296,443	..	..
„ „ Velasco	7,619	400,552	6,790	158,226	..	..	..	..
GERMANY.								
From Port of Galveston	129,306	5,491,747	27,913	697,488	248,905	186,635	9,500	4,465
„ „ Velasco	7,442	291,290	34,790	812,040	..	..	..	..
FRANCE.								
From Port of Galveston	108,668	4,682,214	105	2,515	145,692	103,082	..	..
„ „ Velasco	..	..	..	..	..	..	..	..
NETHERLANDS.								
From Port of Galveston	1,356	51,562	3,673	88,275	481,193	348,159	47,596	22,027
„ „ Velasco	..	..	11,412	261,272	..	..	..	..
RUSSIA.								
From Port of Galveston	13,343	559,381	..	..	..	..	..	..
DENMARK.								
From Port of Galveston	.	..	2,265	68,900	.		..	
„ „ Velasco	..	..	4,646	111,504	.	..	..	..

STATEMENT of Exports of Commodities of Domestic Manufacture and Growth from the Customs District of Galveston for the Year ending December 31, 1893—continued.

Destination.	Cotton.		Oilcake, &c.		Wheat.		Corn.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
	Bales.	Dollars.	Tons (of 2,240 lbs.)	Dollars.	Bushels.	Dollars.	Bushels.	Dollars.
MEXICO.								
From Port of Galveston	..	..	..	..	..	..	17,723	10,678
„ „ Sabine Pass	..	..	..	..	..	..	..	..
BRITISH GUIANA.								
From Port of Galveston	..	..	..	..	..	..	1,200	684
PUERTO RICO.								
From Port of Galveston	..	..	..	..	..	..	1,000	500
CUBA.								
From Port of Galveston	..	..	..	..	..	..	21,485	12,356
Total for 1893	757,593	31,524,595	120,230	2,942,914	1,308,950	934,269	98,509	50,710
Total for 1892	808,628	32,610,901	79,088	1,867,441	377,985	335,240	144,775	95,925
Total for 1891	774,826	34,217,492	43,196	1,008,541	587,395	588,058	12,741	7,251
Total for 1890	499,189	26,303,400	53,484	1,202,779	..	..	35,246	11,989

STATEMENT of Exports of Commodities of Domestic Manufacture and Growth from the Customs District of Galveston for the Year ending December 31, 1893—continued.

Destination.	Wheat Flour		Lumber		Cotton seed Oil		Walnut Logs	Sundries.	Total
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Value.	Value.	Value.
	Barrels.	Dollars.	M. feet.	Dollars.	Gallons.	Dollars.	Dollars.	Dollars	Dollars.
GREAT BRITAIN.									
From Port of Galveston	6,317	35,334	..	..	..	..	9,512	8,664	21,200,496
„ „ Velasco	..	..	..	..	..	..	464	..	559,242
GERMANY.									
From Port of Galveston	714	2,248	..	..	..	..	39,521	407	6,422,511
„ „ Velasco	..	..	..	..	68,800	28,300	..	185	1,131,815
FRANCE.									
From Port of Galveston	..	..	..	..	52,500	19,600	800	1,889	4,760,050
„ „ Velasco	..	..	..	..	..	..	..	..	..
NETHERLANDS.									
From Port of Galveston	709	1,600	..	..	..	..	500	342	512,465
„ „ Velasco	..	..	..	..	180,820	67,926	20,150	..	349,342
RUSSIA.									
From Port of Galveston . ..	..	..	..	..	..	..	..	..	559,481
DENMARK.									
From Port of Galveston . ..	..	..	..	..	..	..	..	..	68,900
„ „ Velasco .. .	..	..	..	..	..	..	..	..	111,504

STATEMENT of Exports of Commodities of Domestic Manufacture and Growth from the Customs District of Galveston for the Year ending December 31, 1893—continued.

Destination.	Wheat Flour.		Lumber.		Cotton-seed Oil.		Walnut Logs.	Sundries.	Total.
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Value.	Value.	Value.
	Barrels.	Dollars.	M. feet.	Dollars.	Gallons.	Dollars.	Dollars.	Dollars.	Dollars.
MEXICO.									
From Port of Galveston	..	..	..	..	..	..	..	..	10,678
„ „ Sabine Pass	54	150	1,470	17,587	1,050	220	3,747	1,053	22,757
BRITISH GUIANA.									
From Port of Galveston	1,724	6,555	2	35	..	..	..	..	7,274
PUERTO RICO.									
From Port of Galveston	4,853	16,766	5	67	..	..	..	..	17,333
CUBA.									
From Port of Galveston	34,695	136,272	..	..	..	..	..	12,819	161,447
Total for 1893 .. .	49,057	198,925	1,477	17,689	303,170	116,040	74,694	25,359	35,895,195
Total for 1892	21,296	98,226	1,334	16,726	41,263	15,639	47,000	9,904	35,097,002
Total for 1891	11,929	51,320	..	16,893	..	2,250	..	..	35,964,460
Total for 1890	19,481	30,511	..	200,600	..	..	..	..	27,853,489

Annex E.—Statement of Vessels engaged in the Foreign Trade in the District of Galveston during the Year ending December 31, 1893.

Entered.

Nationality.	Galveston.				Velasco.				Sabine Pass.			
	Ballast.		Cargo.		Ballast.		Cargo.		Ballast.		Cargo.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
American	3	421	9	1,362	..	..	..	...	3	841	...	...
British	111	161,864	22	29,186	19	24,543	...	...	...	...	...	...
German	1	420	1	454	..	...	...	...	...	...	...	...
Mexican	..	..	3	267	..	...	...	...	...	...	...	...
Norwegian	4	2,215	3	1,248	...	...	...	...	...	...	...	...
Spanish	14	20,946	..	...	...	...	...	...	...	...	...	...
Total for 1893	133	185,866	38	31,518	19	24,543	...	...	3	841	..	..
Total for 1892	117	167,090	41	42,535	9	11,497	1	116	2	645	..	..
Total for 1891	148	199,810	75	64,892	...	...	..	..	..	..	...	...
Total for 1890	149	143,544	72	57,795	...	...	...	..	..	..	..	..

STATEMENT of Vessels engaged in the Foreign Trade in the District of Galveston during the Year ending December 31, 1893—continued.

CLEARED.

Nationality.	Galveston.				Velasco.				Sabine Pass.			
	Ballast.		Cargo.		Ballast.		Cargo.		Ballast.		Cargo.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
American	2	477	6	1,039	...	...	...	...	...	...	13	3,336
British	...	...	171	250,815	...	...	25	33,138	...	...	...	...
German	...	...	2	793	...	...	...	...	...	...	...	...
Mexican	...	...	...	...	...	...	...	...	...	...	4	374
Norwegian	...	...	5	2,038	...	...	...	...	...	...	...	...
Spanish	...	...	10	13,669	...	...	...	...	...	...	...	...
Total for 1893	2	477	194	268,354	...	...	25	33,138	...	...	17	3,710
Total for 1892	7	3,493	182	246,517	...	...	10	11,355	3	1,078	2	801
Total for 1891	12	4,432	232	250,671	...	...	...	...	...	...	...	...
Total for 1890	3	332	219	183,358	...	...	...	...	...	...	...	...

Annex F.—Return of British Shipping at the Port of Galveston during the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered								Cleared							
Total Number of Vessels.			Total Tonnage.			Total Number of Crews.	Total Value of Cargoes.	Total Number of Vessels.			Total Tonnage.			Total Number of Crews.	Total Value of Cargoes.
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.			With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		
14	52	66	13,900	84,747	104,713	1,572	...	87	...	87	128,006	...	128,006	1,981	...

Indirect or Carrying Trade in British Vessels from and to other Countries

Entered								Cleared								
Countries whence Arrived	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes	Countries to which Departed	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.
	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.				With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		
								£									£
United States ...	1	34	35	1,992	51,295	53,287	814	...	United States ...	...	7	7	...	10,264	10,264	168	...
Portugal ...	...	10	10	...	14,164	14,164	220	...	Cuba ...	3	...	3	2,396	...	2,396	65	...
Spain ...	1	9	10	1,550	13,200	14,750	244	...	Mexico ...	1	...	1	1,069	...	1,069	21	...
Cuba ...	6	4	10	5,588	4,577	10,165	224	...	Germany ...	30	...	30	46,227	...	46,227	721	...
Italy ...	...	1	1	...	1,943	1,943	25	...	Holland ...	12	...	12	15,114	...	15,114	264	...
Mexico ...	1	18	19	864	27,063	27,617	435	...	France ...	17	...	17	26,840	...	26,840	400	...
Brazil ...	...	6	6	...	2,935	2,935	73	...	Denmark ...	1	...	1	1,276	...	1,276	23	...
Denmark ...	...	1	1	...	1,530	1,530	25	...	Russia ...	3	...	3	4,093	...	4,093	69	...
Argentina ...	...	2	2	...	3,102	3,102	47	...									
Venezuela ...	...	1	1	...	1,131	1,131	30	...									
Holland ...	...	2	2	...	3,112	3,112	48	...									
Belgium ...	...	1	1	...	1,484	1,484	23	...									
France ...	...	2	2	...	2,787	2,787	45	...									
Germany ...	...	1	1	...	1,503	1,503	23	...									
Costa Rica ...	1	...	1	1,898	...	1,898	23	...									
Total ...	10	94	104	11,892	132,932	144,824	2,299	...	Total ...	67	7	74	96,915	10,264	107,179	1,735	...

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FOREIGN OFFICE.

1894.

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DIPLOMATIC AND CONSULAR REPORTS ON TRADE AND FINANCE.

UNITED STATES.

REPORT FOR THE YEAR 1893

ON THE

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REFERENCE TO PREVIOUS REPORT, Annual Series No. 1181.

Presented to both Houses of Parliament by Command of Her Majesty,
APRIL, 1894.

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UNITED STATES.

BOSTON.

Consul Yeats-Brown to the Earl of Kimberley.

My Lord, *Boston, March* 15, 1894.

I HAVE the honour to enclose my Annual Commercial Report for the year 1893.

I have, &c.
(Signed) M. YEATS BROWN.

Report on the Trade, Commerce and Agriculture of Boston for the Year 1893.

ABSTRACT of Contents.

	PAGE
Summary description of the Consular district	2
,, remarks on the crisis of 1893	4
Industries	6
Fisheries	10
Failures	11
Shipping	13
Rates of freight	13
Immigration	14
Canadian immigration	14
Imports and exports	15
Conclusion	17

The consular district of Boston includes the States of Maine, New Hampshire, Vermont, and Massachusetts, and before entering on the details of my Annual Report, I think it may be worth while to give at least a very brief account of the physical conformation and resources of these States.

State of Maine.

Maine has a total area of 33,040 square miles, of which nearly one-tenth, viz., 3,145 square miles is water; the largest lake, Moosehead, covering 120 square miles.

The population of the State at the last census, taken in 1890, was 661,086, of whom 78,961 were of foreign birth and 1,823 were coloured persons.

The principal cities are Portland, the chief seaport, with a population of 36,425; Lewiston, a manufacturing town, population, 21,701; Bangor, a port of entry and a leading centre of the lumber trade, population, 19,103; Biddeford, 14,443; Auburn, 11,250; and Augusta, the capital of the State, 10,527. Maine is an agricultural State and ranks first amongst New England States in live stock. The total value of farm animals in 1892 was computed at 4,133,120*l.*, of which horses lead in importance, numbering 110,719, valued at 1,972,060*l.* The most important crops are hay and potatoes.

The granite quarries in Maine are of great importance; the total output in 1889 having been of 6,701,346 cubic feet, valued at 445,180*l.* It also produces considerable quantities of slate for roofing, and is the leading State in the production of lime, of which the output in 1889 was 1,903,640 barrels, valued at 304,700*l.*

Maine possessed 1,385 miles of railway in 1892, or about 1 mile to each 23 square miles of area.

State of New Hampshire.

The total area of New Hampshire is 9,305 square miles, of which 300 miles are water. The largest lake, Winipisegee, is 22 miles long.

The State has only 18 miles of sea coast and only one good harbour, Portsmouth, but the streams afford great water-power which is largely used by the manufactories.

The population of the State in 1890 was 376,530, of whom 72,340 were foreign born, and 690 were coloured.

The principal cities are Manchester, population 44,126; Nashua, 19,311; Dover, 12,790; Portsmouth, which is the port of entry, 9,827; and Concord, capital of the State, 17,004.

Hay is the most important crop, rendering in a good year 650,000 tons, worth from 1,200,000*l.* to 1,400,000*l.* The value of the farm animals in the State is about 2,400,000*l.*

There are important granite quarries of which the production has been greatly increased during the last few years, and now render upwards of 3,000,000 cubic feet per annum.

The principal industries, however, are manufactures of various kinds, the cotton industry alone having an annual outturn of about 1,000,000 dol. The woollen industry is also active, besides which a large amount of capital is invested in the boot and shoe trade, in manufactures of wood, and in paper mills.

There were about 1,144 miles of railway open in 1892, being 1 mile of railway to each 8·13 square miles of area.

State of Vermont.

The area of Vermont is 9,565 square miles, of which 430 square miles are water. Lake Champlain which is the boundary between this State and that of New York is 158 miles long. The Connecticut River drains 3,500 square miles, or nearly one-third of the total area of the State, and there are numerous smaller rivers which are largely utilised for water-power.

The population of the State in 1890 was 332,442, of whom 44,088 were foreign born and 1,004 coloured.

The principal cities are Burlington, the capital and one of the most important lumber markets in the United States, population, 14,590, and Rutland, principal seat of the marble industry, population 11,760. There are no other towns of 10,000 inhabitants, the State being essentially rural.

The State possesses upwards of 3,000,000 acres of improved land, and ranks second only to Maine among the New England States in the value of farm products, and is famous for its breed of horses. It exceeds all other States in production of maple sugar; nearly 12,000,000 lbs. of sugar and 130,000 gallons of molasses being gathered in a good year.

The quarries are of great importance, many varieties of marble being produced in constantly increasing quantity. The value of the annual output being quoted at 460,000*l.*, almost all of which is quarried in the neighbourhood of Rutland.

The production of slate for roofing and of granite is valued at 100,000*l.* each; and there are also limestone quarries of considerable value. The State also produces manganese ore and copper. Iron and gold also exist, though not in paying quantities.

In 1892 there were 1,001 miles of railway open, or about 1 mile for each 9·38 square miles of area.

State of Massachusetts.

The area of Massachusetts is 8,315 square miles, of which 275 miles are water. There is no large lake, but the Merrimac, Connecticut, Housatonic, and other rivers furnish great water-power which is largely utilised.

The population of the State in 1890 was 2,238,943, of whom 657,137 were foreign born; of these, 23,570 were coloured persons, 22,144 being Africans, 984 Chinese, 18 Japanese, and 424 "Indians," or aboriginal inhabitants.

Although the State is rich in agriculture, it must be described as a manufacturing and trading State; Boston, as a port, being second only to New York in the whole United States.

The principal cities are Boston, with a population of 448,477 within the city proper, and numbering in "Greater Boston" at the present time not less than 750,000; Worcester with a population of 84,655; Taunton and Springfield, centres of iron and steel industries; the latter seat of the largest arsenal and armoury of the United States (rendezvous also of the annual Harvard and Yale football match which deserves mention even in a commercial report as being a matter of the keenest interest to all ranks and classes of men and persons throughout the United States); Lynn, chief seat of boot and shoe making which is one of the largest industries in the State; Lowell, Lawrence, Fall River, and Holyoke, important centres of the cotton interest. The wool industry is chiefly centered in and near Boston, which is the market for the raw material.

The State has 3,359,679 acres in agricultural farms with 461,919 farm animals of a value of 3,134,720*l*. The hay crop amounts to 674,400 tons, valued at 2,000,000*l*. Considerable crops of oats, potatoes, and corn are grown; and the State produces about 2,800,000 lbs. of tobacco. The principal industries in order of importance, not of capital invested, but of value of goods made is as follows:—Boots and shoes, cotton goods, woollen goods, paper and paper goods, metals and metal goods, machines and machinery, leather, worsted goods.

The fisheries are also important; one-half of the fishing vessels in the United States being owned in Massachusetts, which also owns 69 per cent. of the whole whaling fleet.

There were 2,100 miles of railway open in 1892, or 1 mile of railway for each 3·95 square miles in the State.

The Year 1893.

The year 1893 has been the worst year within the recollection of the present generation of business men, the panic being only exceeded by that of 1873, when, however, it was of a shorter duration, and was not marked by so continuous and heavy depreciation in securities of all descriptions.

1892 a good year.

The year 1892 had shown a decided improvement over 1891. Trade was active under the influence of the good crops of the previous year, and most industries had prospered without entering on speculative production or outstripping demand, so that, at the close of 1892 and during the first months of 1893, business in most, if not all its branches was prosperous, and seemed in an especially sound condition. The prospect of reductions in tariff had some influence in lessening the demand for raw materials, and in making manufacturers cautious, but full time was being worked in all branches of industry. The expected repeal of the purchasing clauses of the Silver Bill was looked upon by capitalists and bankers as a coming relief to the straitened finances of the Central Government, but not as a matter of vital concern to them, and money was easy and credit freely extended

well on into the spring of the year. The impression left by conversation with business men as late as March or even April, 1893, was that business in this district was of a sound unspeculative nature compared to past years, and certainly no one had any foreboding of the extraordinarily severe and needless panic that set in so shortly afterwards. 1893 good until April.

The President's proclamation calling for an extraordinary session of Congress was issued on June 30. Congress met on August 7, and the Bill repealing the silver clauses of the so-called Sherman Act passed the House of Representatives on the 28th of that month by a majority of 242 to 110, but did not pass the Senate till October 30, and then only by 43 to 32. Repeal of Silver Bill.

The financial crisis had made itself felt before the President issued his proclamation, but it probably never would have reached the acute stage it did if the repeal of the Sherman Act could have been carried through both houses at an earlier date, as, independently of the material result of stopping the monthly purchases of silver, the moral effect would have been enormous; and moral effect at the time would have been of great efficacy, because this crisis which has had such widespread results, and has brought about such great individual losses, was, after all, a pure "panic," and was created by prevailing uncertainty and lack of confidence in the immediate future far more than by the silver question in itself, or trade losses, or any of the ordinary causes of financial crisis.

This is very clearly stated in the opening phrases of the Presidential message, which runs as follows—". . . . . Our unfortunate financial plight is not the result of untoward events, nor of conditions relating to our natural resources, nor is it traceable to any of the afflictions which frequently check national growth and prosperity. With plenteous crops, with abundant promise of remunerative production and manufacture, with unusual invitation to safe investment, and with satisfactory assurance to business enterprise, suddenly, financial distrust and fear have sprung up everywhere."

This gives a very vivid picture of the situation and the suddenness with which the crisis came on, though here in Boston there was not so much distrust or fear but a great deal of business-like determination on the part of those who had money in hand to hold on to it, which led to a stringency amounting for a time almost to an impossibility of obtaining ready money. During that time bankers had to refuse accommodation to some of their most trusted clients, and many undoubtedly solvent concerns were forced to suspend payment, many manufacturers having actually to pay their workpeople's weekly wages by cheques, small notes being absolutely unprocurable. Money crisis.

It was curious just at this period to see how even well-informed papers in England misunderstood the real position and constantly spoke of the demand for "gold," whereas gold was not at all what the mass of the commercial world were crying out for. A very few firms in Boston, as elsewhere, were, no doubt,

buying gold for export at that time, as previously and since, but it was the ordinary circulating medium, paper, which the business world wanted and could not get at that time even at 10 or more per cent. and on unexceptionable security.

This period of panic subsided, as far as this district is concerned, in September, and though recovery from such a crisis is slow and industry is necessarily affected by the uncertainty of the customs tariff, which is still under debate, business has been pretty steadily, if slowly, resuming its normal course; and with the opening of the new year the money market has steadied down, and credit is again obtainable on the usual terms.

Tariff.

As to the tariff, though of course the subject is of great interest and importance to many branches of our trade, it would be a useless task to attempt any observations on it, for though the Wilson Bill has passed the House, it is impossible for anyone to predict what modifications it may receive in the Senate or when it may become law.

Exchange.

Exchange on London during 1893 was as follows:—

Month.	For Bills at Sight.	
	Highest.	Lowest.
	Dol. c.	Dol. c.
January	4 88½	4 87½
February	4 89	4 87½
March	4 88½	4 86½
April	4 90	4 88
May	4 90	4 88
June	4 90	4 83½
July	4 85½	4 83
August	4 89	4 83½
September	4 88	4 85½
October	4 87	4 83½
November	4 87	4 84
December	4 88	4 86

	Dol. c.
Highest in the year on April 21, and from May 25 to June 5	4 90
Lowest in the year on July 27 and 28	4 83

Industries.

The Bureau of Statistics of Labour for the State of Massachusetts publishes each year a volume containing a mass of interesting information. From the volume lately issued for the year 1892 I extract only a few items, as the limits of my annual report precludes making use of the details given in this valuable work

Leading industries.

The following table contrasts the productiveness of the nine leading industries of this State in 1892 as compared to the previous year. It does not profess to give the total production in each branch, as it is only compiled from the returns given by those establishments from which returns were obtained in the years under review; but these number no less than 4,473, and may be considered as thoroughly representative:—

Industries.	Number of Establishments Considered.	Value of Goods Made—	
		In 1891.	In 1892.
		Dollars.	Dollars.
Boots and shoes	731	99,394,318	108,347,615
Carpetings	12	9,458,306	8,659,903
Cotton goods	158	89,558,854	91,967,815
Leather	200	18,348,246	20,355,090
Machines and machinery ..	324	25,794,797	26,867,581
Metals and metal goods ..	348	26,132,972	27,207,374
Paper and paper goods.. ..	104	26,195,728	28,169,676
Woollen goods	142	34,551,569	35,673,477
Worsted goods	22	16,548,791	17,054,071
Other industries	2,432	272,364,116	287,225,960
Total, all industries ..	4,473	618,347,697	651,528,562

With the exception of carpetings, therefore, there was an increased production in all the principal articles during 1892. It is to be feared that the next returns will tell a very different tale for the year 1893.

Numbers employed.

The next table shows the number of persons employed in 1891 and 1892 in these leading industries, and distinguishes between the number employed in each of those years at the period of the employment of the smallest and of the greater number of hands, and is interesting as showing considerable variation.

Industries.	Smallest Number of Persons Employed—		Greatest Number of Persons Employed—	
	In 1891.	In 1892.	In 1891.	In 1892.
Boots and shoes ..	38,089	41,097	55,191	57,786
Carpetings	4,678	4,703	5,293	5,315
Cotton goods	68,674	71,144	74,735	78,864
Leather	4,818	5,631	7,187	7,934
Machines and machinery	13,968	14,368	17,949	19,026
Metals and metal goods	11,512	12,803	15,351	16,615
Paper and paper goods	9,544	9,873	10,855	11,440
Woollen goods	16,260	16,289	19,111	19,545
Worsted goods	7,384	7,695	8,524	9,379
Other industries ..	85,492	87,796	121,723	127,035
Total, all industries	260,419	271,399	335,919	352,939

Proportion sexes.

The next table shows the relative proportion of the sexes by percentages in these leading industries for 1891--92, and also for the year 1885 :—

TABLE showing the Average Aggregate Number of Persons Employed during the Years 1885, 1891–92.

Description.	Percentages.					
	1885.		1891.		1892.	
	Males.	Females.	Males.	Females.	Males.	Females.
Boots and shoes	69·46	30·54	71·44	28·56	70·68	29·32
Carpetings	42·12	57·88	45·32	54·68	45·31	54·69
Cotton goods	44·96	55·04	47·38	52·62	47·79	52·21
Leather	97·85	2·15	96·44	3·60	96·35	3·65
Machines and machinery ...	98·57	1·43	98·80	1·20	98·75	1·25
Metals and metal goods ...	90·95	9·05	89·46	10·54	90·08	9·92
Paper and paper goods ...	56·08	43·92	54·07	45·93	54·49	45·51
Woollen goods	61·60	38·40	63·07	36·93	63·50	36·50
Worsted goods	42·13	57·87	49·77	50·23	50·42	49·58
All industries	67·00	33·00	66·24	33·76	66·55	33·45

Chief cities in Massachusetts.

The last table for which I can afford room gives some interesting information regarding the industrial condition of the leading cities in the State:—

Cities.	Population.	Establishments Reporting.	Persons Employed.	Total of Wages Paid.	Capital Invested.	Value of Stock Used.	Value of Goods Made.	Miscellaneous Expenses.
	Number.	Number.	Number.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.
Boston	448,477	7,915	90,198	54,636,695	116,644,490	104,631,879	208,104,683	21,399,162
Brockton	27,294	530	11,141	6,566,314	7,533,399	1,115,755	20,944,705	1,146,169
Cambridge..	70,028	1,231	14,208	7,727,333	20,259,747	19,947,576	35,490,389	2,397,304
Chelsea	27,909	334	3,421	1,879,663	7,068,111	4,655,432	8,072,048	546,041
Fall River..	74,398	312	22,822	8,314,811	36,513,260	16,926,445	31,029,451	2,020,806
Fitchburg	22,037	285	4,195	2,268,221	6,120,050	5,381,910	9,349,993	587,435
Gloucester	24,651	84	2,110	900,491	3,059,898	3,077,998	4,622,722	251,510
Haverhill	27,412	722	14,988	6,815,474	7,925,810	13,561,592	25,340,361	1,805,430
Holyoke	35,637	477	12,150	5,736,708	22,738,233	12,427,539	24,091,667	1,689,909
Lawrence	44,654	521	15,825	6,513,454	29,108,756	14,731,652	25,933,354	1,996,318
Lowell	77,696	828	28,086	10,695,545	40,457,399	21,613,680	39,638,062	3,566,636
Lynn	55,727	1,343	19,792	11,328,797	12,930,755	20,210,003	38,310,585	1,875,902
Malden	23,031	276	4,415	2,161,650	7,050,416	5,428,785	8,694,807	434,307
New Bedford	40,733	351	10,730	4,626,135	19,602,583	7,961,817	15,886,288	972,989
Newton	24,379	170	2,524	1,351,933	4,450,216	2,111,770	4,172,404	240,506
Somerville..	40,152	387	3,126	1,716,496	3,788,018	4,369,064	7,324,082	596,404
Springfield..	44,179	681	9,510	5,391,005	10,524,457	7,583,487	16,191,456	887,633
Taunton	25,448	310	6,379	3,104,023	7,754,773	4,771,096	9,834,584	692,682
Worcester	84,655	978	21,478	11,541,703	25,339,203	20,994,852	39,190,817	1,884,728

Condensed result of tables.

From the returns given by the 4,473 establishments the following condensed general statements are, among others, given :—

The increase in capital devoted to production in 1892 as compared to 1891 in all industries amount to 3·18 per cent., in which increase each of the nine leading articles participated.

The value of stock used increased 4·52 per cent. in 1892 as compared to 1891, and each of the nine leading articles participated except cotton goods and woollen goods, in which there was a decrease of 7·91 per cent. and 6·58 per cent. respectively.

The increase in the aggregate value of goods made in all industries in 1892 as compared with 1891 amounted to 5·37 per cent., and there was an increase in all the nine leading articles except carpetings, which fell off 8·44 per cent.

There was an increase of 4·53 per cent. in the number of persons employed in all industries in 1892, and the total amount of wages paid to them increased 6·10 per cent.

The average yearly earnings per individual, without regard to sex or age, were 445 dol. 49 c. (89*l.* 2*s.*) in 1891, rising to 452 dol. 21 c. (90*l.* 8*s.* 10*d.*) in 1892, the range from highest to lowest in 1891 being 708 dol. 15 c. (141*l.* 12*s.* 7*d.*) to 294 dol. 43 c. (58*l.* 17*s.* 8*d.*), and in 1892, 752 dol. (150*l.* 8*s.*) to 299 dol. 8 c. (59*l.* 16*s.* 1*d.*), the higher earnings ruling in the industries demanding greater skill and employing males chiefly, and the lower in factory industries employing a large proportion of females and young persons.

The average proportion of business done reached 68·56 per cent. in 1891 and 69·31 per cent. in 1892 of the full productive capacity of the 4,473 establishments; and the average number of days in operation was 296·78 in 1891 and 297·14 in 1892.

Annual reports and occasional statistics on manufactures and on labour questions are published also by the other States included in the Consular district, but though they contain much useful information and many interesting details, there are few summary statements suitable for such reports as the present, and, moreover, the States of New Hampshire, Vermont, and Maine, though possessing industrial establishments of some importance, are countries comparatively agricultural, not industrial.

Fisheries.

The fishing season on this coast in 1893 was a good one, and the fish trade was also active and profitable; this being perhaps the only industry which has prospered in this year of depression.

The receipts of fish at Boston as given by the Fish Bureau are as follows :—

Description.		Number.					
		1892.			1893.		
		Domestic Receipts.	Foreign Receipts.	Total.	Domestic Receipts.	Foreign Receipts.	Total.
Mackerel—							
Salt	Barrels ...	15,681	44,773	60,454	6,495	35,773	42,268
Fresh	,, ...	7,106	9,407	16,513	14,248	12,560	26,808
Herrings—							
Salt	,, ...	17,467	23,142	40,689	7,407	14,806	22,213
Foreign	,, ...	3,876	8,994	12,870	2,220	13,001	15,221
Smoked	Boxes ...	804,905	189,655	994,556	597,328	86,226	683,554
Cod	Quintals ...	91,505	41,484	132,989	68,056	39,244	107,300

The receipts of mackerel from Great Britain and British possessions in 1893 were as follows:—

From—	Quantity.
	Barrels.
England	4,780
Ireland	2,206
Dominion of Canada	22,210

Nova Scotia mackerel sold from 14 dol. 50 c. to 16 dol. per barrel. Prince Edward Island somewhat lower. Irish mackerel made their appearance in the market in March, and, as they were of better quality than usual, sold at 14 dol. 50 c.; at the end of June they sold at 12 dol. to 13 dol. according to quality, and declined in November to 11 dol. 50 c. and 12 dol. The receipts of the Norway mackerel have been of the usual fine quality; first receipts selling at 28 dol. to 30 dol. per barrel. The receipts of salt codfish were 107,300 quintals; but in addition to this supply about 50,000 quintals of fresh fish were cured in Boston in 1893. An extensive business in curing fish has grown up here, and whenever the market is over supplied with fresh fish the surplus is taken by the curers.

Prices declined on September 1 to the lowest point known for many years, but advanced in October and November, leaving prices at the end of the season however lower than at the same period in 1892.

Failures in 1893.

The number of commercial industrial failures in this Consular district were very greatly in excess of the average rate.

In 1892 there were only 804 failures with liabilities amounting to 2,040,891*l.*, whereas in 1893, according to "Dun's Review," the number was 1,583 with liabilities amounting to 5,384,877*l.* as follows:—

States.	Manufacturing.			Trading.			Total.		
	Number.	Assets.	Liabilities	Number.	Assets.	Liabilities.	Number.	Assets.	Liabilities.
		£	£		£	£		£	£
Maine	77	61,886	125,281	331	412,990	661,234	408	474,876	786,515
New Hampshire	13	46,473	59,026	44	11,890	37,036	57	58,363	96,062
Vermont	7	12,440	23,268	37	15,921	34,378	44	28,361	57,646
Massachusetts	356	1,075,335	1,918,818	718	1,388,474	2,525,836	1,074	2,463,809	4,444,654
Total for the four States ..	453	1,196,134	2,126,393	1,130	1,829,275	3,258,484	1,583	3,025,409	5,384,877

Shipping

The number and tonnage of vessels of all nationalities which entered the port of Boston from foreign ports, according to the custom-house returns, was as follows, during the last 5 years :—

Year.	Number of Vessels.	Tons.
1889	2,364	1,424,246
1890	2,335	1,464,797
1891	2,342	1,553,600
1892	2,396	1,705,492
1893	2,218	1,650,561

British.

The total arrivals of British shipping for the same period, as by the registers kept at the Consulate, have been as follows :—

Year.	Number of Vessels.	Tons.
1889	1,812	1,115,451
1890	1,827	1,169,732
1891	1,848	1,237,702
1892	1,933	1,377,327
1893	1,785	1,347,406

These figures, although showing a decrease in 1893 as compared to the previous year both in British shipping and that of all nationalities, does not show any decrease, but an increase, at the normal rate, over previous years with the exception of 1892, which was a year of unusual activity. They also show that our flag fully maintains its supremacy in the trade, and the diminution in the number of arrivals, as compared to the tonnage, points to the continual increase of the use of steamers, and of steamers of larger size.

Rates of freights.

Freights to Liverpool on the principal articles of export have varied during the year from lowest to highest rates, obtained as follows :—

Merchandise.		Lowest.			Highest.		
		£	s.	d.	£	s.	d.
Grain	Per bushel ..	0	0	1	0	0	3¾
Provisions	Per ton ..	0	7	6	1	0	0
Flour	„ ..	0	4	0	0	12	6
Cotton	Per lb. ..	0	0	5/64	0	0	5/32
Oilcake	Per ton ..	0	3	6	0	10	0
Cattle	Per head ..	1	5	0	2	10	0
Apples	Per barrel ..	0	1	3	0	2	6
Finished leather	Per ton ..	0	12	0	1	5	0
Sole leather	„ ..	0	13	9	2	0	0
Hay	„ ..	0	16	9	1	15	0

The higher rates in general prevailing at the close of the year.

Outward freights from the United Kingdom were very poor.

Immigration.

The returns of immigrants are made up each year to September 30. The number of alien immigrants who arrived at Boston from transatlantic ports in each of the last five official years was as follows :—

Year.	Number.
1889..	33,979
1890	30,802
1891..	31,556
1892..	31,234
1893..	28,143

The nationality of the 28,143 who arrived in 1893 was as follows :—

Country.	Number.
Ireland	10,640
England	8,000
Wales	55
Scotland	1,808
Sweden and Norway	5,362
Finland and Russia	662
Portugal	551
Italy	20
All other nations	1,045
Total	28,143

The destination of the great majority of these immigrants was this State of Massachusetts, the only considerable exceptions being 1,988 destined for Rhode Island, 1,336 for Illinois, and 1,016 for New York State. The regulations which forbid the landing of any immigrant who cannot satisfy the immigration agent that he is not likely to become a charge to the State are now strictly enforced. The number debarred from landing on this account in 1893 was 117 from transatlantic ports, and 59 from the Dominion of Canada.

Canadian immigration.

The above statistics give no account of the immigrants from the Dominion of Canada, whose number arriving at Boston by sea alone was 28,314 in 1893. No reliable statistics of Canadian immigrants into this Consular district by land are procurable, as they come and go through the frontier States without the possibility of enumeration. There is, however, no doubt that their number has increased considerably of late years, both in the form of permanent settlers, and of labourers and working hands who come over the frontier in times of good demand, and return to

their Canadian homes in slack seasons. The majority of this latter class are from the French provinces.

The total value of the exports of merchandise (exclusive of coin and bullion) from the port of Boston, as given by the Chamber of Commerce, is as follows for the last 5 years :— Imports and exports.

Year.	Value.		
	Home Produce.	Foreign Re-exports.	Total.
	£	£	£
1889	13,931,473	238,012	14,169,485
1890	14,428,318	69,503	14,497,821
1891	16,203,685	84,239	16,287,924
1892	17,648,306	112,734	17,761,040
1893	16,425,784	282,204	16,707,988

The value of the imports of foreign merchandise (exclusive of coin and bullion) is given as follows :—

Year.	Value.		
	Free Goods.	Dutiable Goods.	Total.
	£	£	£
1889	3,495,132	9,597,224	13,092,356
1890	3,605,000	9,608,000	13,213,000
1891	6,631,737	7,529,187	14,160,924
1892	7,572,598	7,546,115	15,118,713
1893	7,402,113	6,421,629	13,823,742

The movement of coin and bullion from this port is comparatively unimportant. There was an exceptional export of 450,000*l.* in 1893, but the export and import of coin and bullion, as a business, is conducted almost entirely through the ports of New York and San Francisco, and by Paso-del-Norte on the Mexican frontier.

The decrease in the total value of exports, as compared with 1892, is great, amounting, as it does, to 1,000,000*l.*, but 1892, as I have before said, was an exceptional year, and these tables show that there is actually an increase over 1891 and all previous years. Decrease in exports.

The decrease in imports is yet more decided, the value being more than 1,000,000*l.* below 1892, and also less than in 1891. The falling-off was entirely in the latter half of 1893, the values in the first 6 months being actually in excess of the imports of the same period in 1892. This was not the case with regard to Decrease in imports.

exports, the decrease in which was continuous throughout the year.

Course of trade.

It is rash to predict the course of trade, for it depends on so many things besides the apparent need of the moment, but one would naturally expect that the large withdrawal of British capital from this country consequent on our losses in other parts of the world would have led to increased export from these ports, and it is likely, at any rate, that the export for the current year will be greater than during 1893. Much, however, will depend upon the outcome of the debate on the proposed alterations in the tariff, for, of course, if the result should be to encourage import, that fact in itself will go far to increase export.

Exports of corn, wheat, flour, oats, butter, cheese, lard.

The only articles of home produce of which export was greater in 1893 than in the previous year was corn, of which 5,362,000 bushels were exported, against 2,715,000 bushels in 1892. Of wheat the export was only 5,088,000 bushels, against 7,404,000 bushels in 1892. The export of flour was about stationary. Of oats the quantity was only about half that exported in 1892. Of butter, only about 636,600 lbs. was exported, against 1,007,200 lbs.; of cheese, only 10,888,000 lbs., against 11,300,000 lbs.; of lard, 66,038,000 lbs., against 73,273,000 lbs. The export of bacon, fresh beef, and apples also fell off, and of cattle only 95,388 head were exported, against 133,072 head in 1892.

Bacon, beef, apples, cattle.

Canadian hay.

On the other hand, there was a very large export of hay, amounting to 558,000 bales in 1893, but this was not the growth of this country, but of Canada, and was brought to Boston by rail for shipment in transit to England.

Imports of tea, coffee, sugar.

As to imports, the receipts of tea, coffee, and sugar were all less than in 1892. The import of raw wool, and the receipts of home-grown wool, both show a decrease, having been of 127,179 bales, and 475,862 bales respectively in 1893, against 195,498 bales and 632,368 bales in 1892. The stock in store, on the other hand, is unprecedentedly large, no doubt owing to the falling-off in work consequent on the financial crisis. In the annual report of the Chamber of Commerce just issued the total amount now on hand in Boston is stated to be 42,601,500 lbs., against 33,115,500 lbs. a year ago. Of this quantity 3,088,000 lbs. is Australian wool, 95,000 lbs. from the Cape, and 100,000 lbs. East Indian.

Raw wool.

Stock of wool.

Chemicals. Tin-plates. Other British goods.

The import of "chemicals," of tin-plates, and of almost all goods of British produce and manufacture have decreased. In fact I do not find any British article of which the import has increased, although in many there seemed to be some promise of activity at the beginning of the year.

Nova Scotia coal.

One article of which there may be a large import in the near future is Nova Scotia coal. The present duty of 75 c. per ton is probably too high to allow it to compete successfully with the southern coal, but should the duty be taken off, or even sensibly reduced, it will certainly be imported, and in large quantities to the mutual advantage of the producing country and of New

England, whose manufacturers would hail with pleasure the assistance of cheaper fuel.

Conclusion. At the time of writing this report more hopeful views of a revival of trade seem to prevail. In the industries there have been some resumptions of business and no fresh closures of works, but operatives have been obliged in many instances to accept reductions of wages. It cannot be said, however, that there is any buoyancy as yet, or anything like prosperity in the larger branches of trade or industry, and there has been throughout the winter and up to the present time much distress and poverty among the working-classes, borne, on the whole, with fortitude and dignity, and met by ready and generous assistance on the part of those who have a greater store of this world's wealth.

Discourage immigration. In conclusion, I would earnestly advise that no one should emigrate at present to this country in search of work. However bad times may seem to be at home this is, at any rate, not the moment to come here. Thousands of men of all classes and conditions have been thrown out of work in consequence of the financial crisis, and both private resources and those of the States are heavily taxed to tide over these terribly trying times, and naturally enough, until American citizens are provided with employment, it is hopeless for a foreigner to attempt to find work. I cannot, therefore, too strongly urge our people to stay at home just at present, or at least seek some other field for their work, whatever may be their trade or occupation.

Annex A.—RETURN of Shipping in the Foreign Trade at Boston as given by the Custom-house for the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British and other foreign	1,117	191,798	790	1,284,603	1,907	1,476,401
American	216	99,003	95	75,157	311	174,160
Total	1,333	290,801	885	1,359,760	2,218	1,650,561
,, for the year preceding ...	1,458	299,715	938	1,405,777	2,396	1,705,492

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British and other foreign	1,088	159,705	613	995,648	1,701	1,155,353
American	295	96,844	89	71,506	384	168,350
Total	1,383	256,549	702	1,067,154	2,085	1,323,703
,, for the year preceding ...	1,517	278,415	774	1,164,966	2,291	1,443,381

Annex B.—RETURN of the Principal Articles of Export from, and Imports into, the Port of Boston during the Fiscal Years ending June 30, 1893–92.

EXPORTS.

Articles.	Value.	
	1893.	1892.
	£	£
Meat and dairy products	4,088,162	6,477,832
Horned cattle	1,892,389	2,233,709
Corn, flour, and other bread stuffs	2,977,140	3,366,518
Raw cotton	2,044,640	2,476,426
Leather, and manufactures of ..	898,432	844,264
Cotton manufactures	156,358	186,635
Tobacco in leaf and manufactured	79,676	70,558
Iron, steel, and manufactures of ..	218,125	232,244
All other home produce	4,569,109	1,434,119
Total export of home produce and manufacture	16,919,031	17,322,305
Export of foreign merchandise	173,053	112,822
Total, all merchandise ..	17,092,084	17,435,127
Coin and bullion	450,050	190
Grand total	17,542,134	17,435,317

IMPORTS.

Articles.	Value.	
	1893.	1892.
	£	£
Sugar and molasses	2,629,733	2,670,871
Chemicals, drugs, &c.	1,132,640	1,019,521
Iron, steel, and manufactures of, and machinery	1,048,818	832,455
Hides, skins, &c.	1,076,322	1,498,972
Wool and hair of animals	2,182,500	792,253
Woollen goods	373,730	364,249
Flax, hemp, and manufactures of	627,841	671,248
Cotton goods	277,745	274,104
Fish	188,185	179,835
All other goods	6,334,017	6,052,590
Total	15,871,531	14,356,098
Import of coin and bullion ..	5,841	2,589
Grand total	15,877,372	14,358,687

NOTE.—These tables do not coincide with the values of imports and exports in the body of the report, which are for the calendar years, whereas these tables are taken from the annual returns issued by the United States Government, which are made up to June 30 in each year.

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ON THE

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REFERENCE TO PREVIOUS REPORT, Annual Series No. 1176.

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1239.	Madrid	½d.	1297.	Stettin	3d.
1240.	Port-au-Prince	2d.	1298.	Rome	2½d.
1241.	Frankfort	3d.	1299.	Dantzig	7d.
1242.	Erzeroum	1d.	1300.	Sofia	2½d.
1243.	Palermo	3½d.	1301.	Mexico	1½d.
1244.	Naples	1d.	1302.	Paris	1d.
1245.	Guatemala	1d.	1303.	Buenos Ayres	½d.
1246.	Madrid	1d.	1304.	Tangier	2½d.
1247.	Gothenburg	2d.	1305.	Somali Coast	½d.
1248	Brindisi	2½d.	1306.	Porto Rico	1d.
1249.	Fiume	2d.	1307.	Paramaribo	1d.
1250.	Leghorn	2½d	1308.	Oporto	1½d.
1251.	San Francisco	5½d.	1309.	Naples	½d.
1252.	Bushire	2d.	1310.	Salonica	2½d
1253.	Nagasaki	1d.	1311.	Valparaiso	2d.
1254.	Smyrna	1d.	1312	Mozambique	1d
1255.	Yokohama	1½d.	1313	Odessa	1½d.
1256.	Stockholm	1½d.	1314	Hermanus	2½d.
1257.	Lisbon	1½d.	1315.	Batoum	4d.
1258.	Tientsin	1d.	1316.	Quilimane	1d.
1259.	Port Said	1d.	1317.	Copenhagen	1d.
1260.	Hiogo and Osaka	2½d	1318.	Lima	1d.
1261.	Damascus	1d	1319.	New York	1d
1262.	Samos	½d	1320.	Baghdad and Bussorah	1d.
1263	Rio Grande do Sul	2½d.	1321.	Rio de Janeiro	3d.
1264.	Jeddah	1d	1322.	Réunion	3½d.
1265.	Vienna	3d	1323.	Berne	1d.
1266.	Shanghai	3d.	1324.	Kiukiang	½d
1267.	Bangkok	1d	1325.	Resht	2½d.
1268.	Meshed	1½d.	1326.	Florence	1d.
1269.	Cadiz	2d.	1327.	Hakodate	1d.
1270.	Cherbourg	1d	1328.	Paris	2d.
1271.	Erzeroum	½d.	1329.	Paramaribo	1½d
1272.	Christiania	5d.	1330.	St. Petersburg	2½d.
1273.	Buda-Pesth	3d.	1331.	Patras	1½d.
1274.	New York	3d.	1332.	Calais	2d.
1275.	St. Petersburg	7½d	1333.	Loanda	1d.
1276.	Alexandria	1½d.	1334.	Bordeaux	2½d.
1277.	Tokio	2½d.	1335.	Taganrog	1d.
1278.	Bilbao	3½d	1336.	Galveston	8½d.
1279.	Beyrout	6d.	1337	Riga	2d.
1280.	Pekin	2½d	1338.	Batavia	1½d.
1281	Salvador	1d.	1339.	Boston	1½d

No. 1340.

Reference to previous Report, Annual Series No. 1176.

UNITED STATES.

BALTIMORE.

Vice-Consul Coates to the Earl of Kimberley.

My Lord, *Baltimore, March* 10, 1894.

I AM directed by Captain Segrave, Her Majesty's Consul at this port, to transmit herewith to your Lordship a Report prepared by me, in obedience to his instructions, on the Trade and Commerce of Baltimore during the year 1893.

I am also to forward similar Reports from the British Vice-Consuls at Norfolk, Va., and Richmond, Va.

I have, &c.

(Signed) A. G. COATES.

Report on the Trade and Commerce of the Consular District of Baltimore for the Year 1893.

ABSTRACT of Contents.

	PAGE
Baltimore—	
Trade and commerce	2
Imports and exports	2
Custom-house receipts	3
Immigration	3
Freights	3
Coal, &c.	3
Cotton	4
Tobacco	4
Coffee	4
Cattle	4
Cereals	4
Canned goods	4
Shipping casualties	5
Facilities	5
Marriage, divorce, &c.	5
Norfolk (Va.)—	
Trade report	9
Richmond (Va.)—	
Trade report	12

Trade and Commerce.

The great business depression and financial crisis of the past year have not had as disastrous effects on the trade of Baltimore as on that of other American cities.

This place has been, with sundry exceptions, singularly free from commercial failures. The record of exemption from loss by the closure of banks has been unbroken.

The substitution of electric and cable cars for horse cars has been further carried out; and much excellent work has been done in the construction of new city and suburban lines. The means of communication in Baltimore and its neighbourhood have, indeed, almost reached a state of perfection.

The great change to rapid transit has occasioned some accidents involving loss of life, and the various companies and inventors are now making great efforts to secure fenders, which will effectively prevent their recurrence.

The construction of the great belt tunnel under the city, of the Baltimore and Ohio Railway, has been steadily continued, and will probably soon be completed. In this tunnel trains are to be hauled 6 miles or 7 miles by powerful electric motors.

As compared with other great cities of the Union there has not been much distress. The circumstance is accounted for by the variety of industries and number of small factories in and around Baltimore. It is true, however, that one or two large industrial undertakings went into liquidation.

This place possesses many advantages as a manufacturing and commercial centre. The climate is mild and salubrious; comparatively little money need be spent on fuel; rents are reasonable for this country, and food is cheap and abundant. In addition to these advantages is the proximity of Baltimore to the sources from which raw material is drawn. The city, moreover, has good means of distribution both by land and water.

The population and extent of this place have been keeping pace with the increase of its manufactures and commerce. During the last 5 years 10,000 new buildings were erected, at a cost of about 2,371,134*l.* (11,500,000 dol.).

Imports and Exports.

The value of foreign merchandise imported into Baltimore was about 3,057,603*l.*, an increase of 121,816*l.*, as compared with that of the previous year. This increase is partly due to the large quantity of tin-plate imported.

On the other hand, the value of merchandise exported shows a decrease, having fallen from 19,175,257*l.* in 1892 to 15,983,171*l.* in 1893. This is largely due to the great falling-off in the exportation of grain (oats excepted).

The clearing-house.

The statement of the bank clearances as prepared at the clearing-house amounted to 145,512,200*l.*, against 158,630,080*l.*

in the previous year, when the clearances are said to have been the heaviest in the history of the clearing-house.

The falling-off was due to the panic that prevailed during the past summer, and the season of financial depression which preceded and followed it.

The total receipts of the custom-house from all sources show an increase for the year of 2,477*l*. For 6 years the receipts were as follows :— Custom-house receipts.

Year.	Amount.
	£
1893	828,042
1892	825,565
1891	673,615
1890	640,371
1889	628,683
1888	585,094

There has been a heavy decrease in immigration, which is partly attributable to the cholera scare and stringent quarantine regulations. Immigration.

The total number landed at this port was 21,186, a falling-off of about 56 per cent. as compared with that of 1892. (There were also 820 passengers landed here, who were not classed as immigrants.) The immigrants consisted of 11,546 males, and 9,640 females. Their nationalities were as follows :—

Country.	Number.
England	30
Scotland	10
Ireland	8
Germany	12,975
Russia	3,584
Austria	2,826
Hungary	848
Bohemia	634
Sweden	59
Denmark	58
Italy	56
Poland	36
Switzerland	17
Roumania	14
Norway	13
Netherlands	6
Finland	5
France	4
Argentine Republic	3

During most of the year ocean freights were exceptionally low. There was, however, a decided revival towards the close of the year. Ocean freights.

The business in coke and bituminous coal has considerably Coal and coke.

exceeded that of 1892. The total shipments were about 170,000 tons.

There is a good prospect that the export trade in coke will largely increase. A scheme is now on foot to establish a line of steamers, whose principal traffic will be carrying coke to Mexico.

Cotton. This staple fluctuated a good deal in consequence of the state of the money market. Estimates of the total yield vary from 6,660,000 bales to 7,700,000 bales. The export of cotton shows a large decrease.

Tobacco. The crop was somewhat larger than that of the previous year, but the prices obtained were below the average, as the quality of the product was inferior.

The Maryland crop amounted to 22,000 hogsheads, and the purchase of 10,000 hogsheads by French buyers helped to sustain the market.

Baltimore does a considerable trade in leaf and manufactured tobacco, and this industry gives employment to a large number of persons. The value of sales during the year amounted to 2,268,041*l.*

Coffee. The coffee trade fluctuated considerably. The value of the imports was larger than that of 1892. On the whole this trade was one of the most profitable businesses of the year, and it is expected to further improve in 1894.

Cattle. There was a large decrease in the number of cattle exported (as compared with the previous year). They were sent to the following ports:—

Ports.	Head of Cattle.
Liverpool	22,100
London	10,824
Deptford	1,783
Newcastle	175
Glasgow	4,066
Leith	200
Havre	236
Total	39,384

Grain trade. With the exception of oats there was a falling off in this trade.

During the first months of the year the exports were large. They, however, gradually decreased and towards the end of the year became insignificant.

Canned goods. The export of canned goods far exceeded that of 1892.

Peaches.—This business was large but not so profitable as in some previous years. A considerable number of peaches were preserved and brought fair prices. However, the crop was not so good as had been anticipated in the early part of the year. This circumstance is to be attributed to violent storms having caused damage to the blossoms and immature fruit.

Peas.—The packing of green peas was below the average in quantity, but the peas were of good quality. Baltimore holds a high reputation for the cultivation of this vegetable.

Tomatoes.—These were packed in unusually large quantities, and canners will in future devote increased attention to this industry.

Pineapples.—The canning was below the average in quantity, but the fruit was good. Some Baltimore packers now receive pineapples direct from their own plantations in Florida.

Indian corn.—A large quantity was packed. Prices obtained, however, were unsatisfactory chiefly owing to the large surplus supply remaining since 1892.

Seventy-three marine disasters were reported at the custom-house, causing the loss of forty-six lives, 28,380*l.* in vessel property and 11,321*l.* in cargoes. Marine disasters.

Shipping Facilities.

Steady improvements have been made in the port of Baltimore in carrying, handling, housing and exporting grain and assorted merchandise. The first steps towards this improvement were made by the railway companies in building and placing at the disposal of shippers, cars that were fully equipped with all facilities for the rapid and careful moving of cereals to the seaboard without loss or damage. Then came under their consideration the handling and housing in the best manner and at the least cost to the merchants. Baltimore has now elevator storage for nearly 6,000,000 bushels of grain. These elevators have the best appliances. The export carrying arrangements have also been improved and increased. Shipping facilities.

Marriages.

There were 4,613 marriage licences issued during the year, an increase of 111 as compared with 1892. Marriages.

There were 346 applications for divorce and 135 decrees were granted.

Annex A.—RETURN of all Shipping at Baltimore in the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	18	7,643	480	856,153	498	863,796
American, foreign only	148	48,878	1	626	149	49,504
Dutch	...	...	19	39,973	19	39,973
Swedish and Norwegian	4	1,528	55	25,082	59	26,610
Italian	15	9,984	...	...	15	9,984
Spanish	...	...	7	12,875	7	12,875
German	2	490	94	349,390	96	349,880
Total	187	68,523	656	1,284,099	843	1,352,622
,, for the year preceding ...	219	76,938	752	1,431,789	971	1,508,727

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	18	7,643	484	860,856	502	868,499
American, foreign only	132	52,453	3	2,902	135	55,355
Dutch	...	...	9	39,973	9	39,973
Swedish and Norwegian	3	988	55	25,082	58	26,070
Italian	15	10,364	...	...	15	10,364
Spanish	...	...	7	12,875	7	12,875
German	2	490	94	349,390	96	349,880
Total	170	71,938	652	1,291,078	822	1,363,016
,, for the preceding year ...	218	85,044	761	1,451,864	979	1,536,908

Annex B.—Return of the Principal Articles of Export from Baltimore during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Grain and bread stuffs—					
Wheat	Quarters	1,630,956		2,046,017	
Flour	Tons	643,417		727,107	
Corn	Cwts.	63,299		169,747	
Meal	Tons	2,173		4,716	
Rye	Bushels	165,518		749,892	
Oats	,,	1,255,229		...	
Provisions—					
Cattle	Head	39,384		54,932	
Beef, various	Tons	12,856		20,196	
Pork, ham, and bacon	,,	1,205		10,328	
Canned goods	Cases	122,864		38,420	
Lard, tallow, and grease	Tons	22,500		49,923	
Oils—					
Illuminating	Barrels	567,525		419,913	
Vegetable and animal	,,	63,075		245,000	
Oilcake	Tons	20,491		33,889	
Minerals—					
Copper, various	,,	19,781		34,139	
Coals	,,	170,583		101,929	
Timber—					
Lumber	M. feet	30,260		29,055	
Staves	Thousands	1,244		1,216	
Various—					
Apples	Tons	945		2,796	
Bark	Bags	51,824		36,689	
,, extract	Barrels	16,941		13,486	
Cotton	Bales	198,619		271,150	
Resin	Barrels	53,370		78,648	
Seeds	Tons	5,214		3,361	
Glucose	,,	4,390		1,034	
Starch	,,	3,511		2,061	
Tobacco	Hogsheads	55,514		62,010	
Wax	Tons	1,216		927	
Whisky	Barrels	58,436		33,863	
Hay	Tons	2,958		...	
Oleomargarine	,,	9,635		...	
Sugar	,,	9,300		...	

Total value of exports = 15,983,171*l.*

Total value of exports = 19,175,257*l.*

Annex C.—Return of the Principal Articles of Import into Baltimore during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Minerals, metals—					
Iron—					
Ore	Tons	296,686		284,959	
Manganese	,,	32,576		14,424	
Spiegle	,,	8,283		2,478	
Purple ore	,,	3,378		25,960	
Various	,,	2,817		1,971	
Steel, various	,,	1,918		1,342	
Tin plate	Boxes	921,124		876,173	
Chemicals and fertilizers—					
Salt—					
Manure	Bags	38,830		95,554	
Cake	Casks	2,863		13,771	
Soda—					
Ash	,,	23,834		63,507	
Caustic	,,	2,686		9,877	
Sulphur	Tons	13,726		15,077	
Bleaching powder	Pieces	1,287		8,825	
Fertilizers, other	Bags	258,688		84,906	
Clay—					
Various	Tons	8,259		..	
Cement	Casks	216,030		221,066	
Earthenware and china	Crates	21,722		35,827	
Drink—					
Beer	Barrels	2,567		3,471	
Mineral waters	Cases	11,723		6,811	
Whisky	Barrels	6,606		5,601	
Wines and liquors	Cases	15,143		13,720	
Fruit—					
Bananas	Bunches	1,179,414		585,593	
Cocoanuts	Thousands	1,456		4,329	
Pine-apples	Dozens	287,492		492,901	
Lemons and oranges	Boxes	18,161		27,276	
Fruit, dried	Packages	12,846		25,739	
Various—					
Coffee	Tons	58,215		41,649	
Fish, salt	Barrels	15,197		38,879	
Rice	Tons	10,285		9,416	
Salt	,,	7,308		11,315	
Pepper and spices	Bags	2,218		5,055	
Tar, gas, and coal	Casks	5,674		9,870	
Hides	Bales	18,559		2,222	
Paints	Tubs	5,188		6,729	
Pickles and preserves	Cases	968		2,349	
Assorted merchandise	Packages	22,220		...	

Total value of imports = 3,057,608*l*.

Total value of imports = 2,936,787*l*.

Annex D.—TABLE showing the Total Value of all Articles Exported from or Imported into Baltimore during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	10,471,923	10,727,628	1,147,301	1,357,893
Belgium	550,000	1,200,000	130,000	130,000
Brazil	275,000	450,000	133,000	353,947
Cuba and Spain ..	48,234	120,000	110,000	250,000
France	650,000	1,200,000	25,000	15,000
Germany	2,875,014	2,627,629	863,302	258,947
Netherlands	812,000	2,150,000	434,000	240,000
Italy	40,000	..	55,000	30,000
Scandinavia	71,000	250,000	..	..
Other countries ..	190,000	450,000	160,000	300,000
Total	15,983,171	19,175,257	3,057,603	2,935,787

NORFOLK.

Mr. Vice-Consul Barton Myers reports as follows:—

Notwithstanding the unsettled condition of the finances of the country, and the general depression in business resulting therefrom, the trade at Norfolk for the year 1893 has materially increased over the preceding year. The cry of dulness in trade is not borne out by the figures herewith presented.

A few weak concerns in this section have succumbed to the pressure for ready money to meet obligations, and these have been confined mostly to the retail dealers with little capital invested in their business.

There is not a discouraging feature in the comparison of receipts of leading articles of trade, but, on the contrary, the marked increase in many branches is a matter of congratulation.

The statement of shipping shows a large increase in tonnage of vessels entered and cleared at this port during the past year, though the gain in number is small.

The value of exports as compared with 1892 shows a handsome gain for the year 1893 of 439,480*l.*

The increase in the value of imports is even more noticeable, being considerably over 50 per cent. greater.

The movement of coal at Lambert's Point for the year ending December 31, 1893, amounted to 1,774,040 tons, which, estimated at 3 dol. a ton, realises the handsome sum of 5,322,120 dol.

During the year 1,945 vessels carried coal from the Lambert's Point piers as follows:—Steamships, 491; ocean tugs and barges, 753; schooners, 701.

The increase in 1893 in the following named articles shows a steady gain in some of the leading branches of the trade of this port :—

Increase in—		Quantity.
Peanuts	Bags	121,485
Coffee	„	450
Sugar	Barrels ..	7,500
Cheese	Boxes.. ..	2,500
Butter	Tubs	1,500
Flour	Bags	43,000
Fish..	Barrels ..	3,000
Lard	Tubs	31,000
„	Tierces ..	2,000
„	Cases.. ..	3,100
Meat (bulk)..	Lbs.	2,300,000
Meat	Boxes.. ..	8,800

There was a considerable falling-off in the number and value of buildings erected here during the past year, which was probably due to the unusual stringency of the money market.

Within the past 18 months the banking facilities of the city have been augmented by the addition of two new banks (one "National," the other "State"), with an aggregate capital of 450,000 dol.

These banks have proved a great addition, and are enabling the cotton dealers, who are usually large borrowers, to handle their business with much greater ease.

The assessed value of property in Norfolk as compared with 1892 is as follows :—

Description.	Assessed Value in—	
	1892.	1893.
	Dollars.	Dollars.
Real estate	18,942,600	19,441,350
Personal property	2,869,090	3,346,928
Total	21,811,690	22,782,278
Gain in value for 1893 ..	..	1,470,588

The transportation facilities in the city and suburbs will be greatly improved by the electric line, which is expected to be in full operation by May 1. This will probably be a marked improvement over the old horse-car system which has been in use heretofore.

TABLE showing the Principal Articles of Export and Import at this Port during the past Year, value calculated at 5 dol. to the 1*l*.

EXPORTS.

Articles.		Quantity.	Value.
			£
Cotton	Bales	171,185	..
Corn	Bushels	513,732	..
Wheat	„	49,266	
Cotton-seed sweepings	Bales	700	..
Cotton waste	„	800	..
Fence	Rails	150	..
Soap	Lbs.	362,176	..
Feathers	„	12,000	..
Machinery	„	206,869	..
Ochre	Barrels	710	..
Canned goods	Cases	780	..
Coal	Tons	145,701	..
Flour	Barrels	113,270	..
Tobacco	Lbs.	12,901,588	..
Cotton-seed meal	„	11,388,700	..
„ „	Bags	11,180	..
Lard	Lbs.	1,744,950	..
Bark	Bags	19,803	..
Cotton-seed oil	Gallons	104,000	..
„ „	Lbs.	2,000	..
Staves	..	..	41,760
Logs	..	..	135,660
Headings	..	..	1,400
Total, 2,115,962*l*.	..	..	..

IMPORTS.

Articles.		Quantity.	Value.
			£
Muriate potash	Tons	500	..
Kainit	„	3,510	..
Nitrate of soda	Bags	6,800	..
Salt	Lbs.	3,531,827	..
Sperm oil	Gallons	19,960	..
Wine	Cases	7	..
„	Casks	4	..
„	Octaves	4	..
Bananas	Bunches	87,216	..
Cocoanuts	..	138,400	..
Pine apples	..	1,250	..
Miscellaneous	..	..	1,718
Total, 24,762*l*.	..	..	..

TABLE showing the Movement of Shipping at this Port, not including the Coasting Trade in American Vessels, representing the Entries and Clearances to and from Foreign Ports only.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	8	4,581	439	627,619	447	632,200
Spanish	...	...	50	81,059	50	81,059
German	...	...	8	14,488	8	14,488
Norwegian	...	...	11	12,993	11	12,993
American	12	4,789	1	137	13	4,926
Italian	7	4,080	...	...	7	4,080
Total	27	13,450	509	736,296	536	749,746

CLEARED.

Nationality.	Sailing.		Steam.		Total	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels	Tons.
British	5	2,115	414	604,799	419	606,914
Spanish	...	...	48	78,244	48	78,244
German	...	...	6	11,032	6	11,032
Norwegian	...	...	10	12,406	10	12,406
American	28	12,177	5	3,005	33	15,182
Italian	8	5,131	...	...	8	5,131
Total	41	19,423	483	709,486	524	728,909

RICHMOND.

Mr. Vice-Consul Handcock reports as follows :—

General trade.

That there have been no heavy failures among the banks and large business houses of this city during the past year of financial depression, shows that Richmond has weathered the storm better than most cities in the States.

Business has indeed in common with other places been at its worst, and still continues so, failures among the shop-keepers and small traders have been numerous, and it is difficult at present to put any faith in the prospect of good times close ahead which most business men here, with their characteristic confidence, seem so assured of.

The banks.

Banking business for the past year shows a decrease in the deposits of over 3,500,000 dol. and in the clearings of 11,167,223 dol. 51 c. as compared with 1892. This percentage of decrease is believed, however, to be considerably less in proportion to that incurred by the banks of other cities in the north and south.

On August 10 last when the panic was at its height and money practically unobtainable, the banks for their own protection

by agreement among themselves instituted a system of payment by certified cheques and suspended the honouring of cheques in currency; sums over 50 dol. being paid in script.

This mode of business naturally caused an immense amount of inconvenience during the few weeks it lasted, but in the end it served its purpose by preventing an undue run on the banks during this critical period.

The jobbing trade. Commission.

For the first quarter of the year the prospects of the "jobbers" could hardly have been better, and how business in this important trade has declined will be seen from the following figures:—

In 1891 the total sales amounted to 36,009,030 dol., in 1892 36,250,830 dol., in 1893 to 32,725,930 dol., or a decrease of 3,524,900 dol.

In addition to this, contrary to the practice of previous years, nothing has been done towards the opening up of fresh fields for the extension of trade.

Tobacco.

The tobacco trade in common with the remainder has felt the prevailing want of confidence. For the first 3 months or so of the year business all round was brisk enough and particularly so as regards the sales of loose leaf, but from April to the close of the year losses have been heavy, though curious to say no failures are reported.

The crop of 1893 is said to be much inferior to that of 1892, Virginian bright leaf tobacco having turned out quite a failure from bad weather, &c., the market in this commodity being supplied from North and South Carolina.

The dark tobacco crop of 1893, though somewhat inferior, does not appear to have suffered in the same way as the bright tobacco, and a large supply is expected on the market early this year. Sun-cured and Burley (western) tobaccos have been in more demand than ever during the year.

The 1893 crop of Burley is reported only moderately good, "lacking in fine wrappers and running mainly into fillers,"—the terms of the report.

The market here for bright loose tobacco is steadily attracting buyers from other parts of Virginia and from North Carolina.

The dark loose sales are also coming into favour.

The James River Improvement.

The work on the James River noticed in last report has been steadily prosecuted during the year, and it is expected that by December 1 next the channel from the city limits across Richmond Bar will be, at least, 80 feet wide and will have a depth of 18 feet at mean low water all the way to Hampton Roads.

Statistics of the port.

Tables giving the statistics of the port for the past year are attached herewith as follows:—

Table A.—Return of ships, &c.

Table B.—Return of exports.

Table C.—Specification of imports.

Table D.—Value of articles imported and exported.

Table A.—RETURN of Vessels Entered and Cleared from the Port of Richmond, Va., and its Sub-Port of West Point during the Year 1893 (not including the Coasting Trade of American Vessels).

ENTERED.

Nationality.	Steam.		Sailing.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	7	12,246	..	..
Norwegian	..	..	3	907
United States	..	..	2	720
Total	7	12,246	5	1,627

CLEARED.

Nationality.	Steam.		Sailing.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	7	12,246	2	544
Norwegian	..	..	3	907
United States	..	..	5	2,180
Total	7	12,246	10	3,631

Table B.—RETURN showing Exports from the Port of Richmond, Va., during the Year 1893.

Articles.		Quantity.	Value.
			Dollars.
Cotton	Bales	51,869	2,124,549
Flour	Barrels ..	20,816	75,807
Railroad ties (sleepers) ..	..	24,642	13,226
Staves	..	14,945	1,318
Shuttle blocks	Tons	422	5,270
Lard	Kegs	300	1,350
Total	..	..	2,221,520

Table C.—Specification of Articles Imported into Richmond, Va., during the Year 1893.

Articles.	Value.
	Dollars.
Guano	14,380
Garden seeds	5,804
Woollen goods	3,095
Statues and grave stones	3,297
China and earthenware	2,781
Tobacco and cigars	1,920
Wines and spirits	1,198
Olive oil	760
Toys	407
Brushes	892
Miscellaneous	8,109
Total	42,643

Table D.—Return showing the Value of Articles Exported from or Imported into Richmond during the Year 1893.

Country.	Exports.	Imports.
	Dollars.	Dollars.
Great Britain	2,023,204	11,764*
Germany	107,984	4,839
France	..	5,887
Belgium	..	1,423
Italy	..	629
Austria	..	883
Cuba	..	1,233
Canada	..	1,605
Brazil	77,106	..
Orchilla, W.I.	..	14,380
Mexico	13,226	..
Total	2,221,520	42,643

* Does not include leaf tobacco returned unsold from England, value 23,460 dol.

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UNITED STATES.

REPORT FOR THE YEAR 1893

ON THE

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REFERENCE TO PREVIOUS REPORT, Annual Series No. 1205.

Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1894.

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UNITED STATES.

NEW ORLEANS.

Consul St. John to the Earl of Kimberley.

My Lord, *New Orleans, April* 16, 1894.

I HAVE the honour to transmit herewith my Annual Trade Report for 1893, as well as those from Mr. Howe, Her Majesty's Vice-Consul at Pensacola, and Mr. Barnewall, British Vice-Consul at Mobile.

I have, &c.
(Signed) C. L. ST. JOHN.

Report on the Trade and Commerce of the Consular District of New Orleans for the Year 1893.

ABSTRACT of Contents.

	Page
New Orleans—	
Trade and business	2
Cotton	3
Cotton consumption	4
„ spindles	4
„ mills	4
Packing of cotton bales	5
Supply and distribution of cotton	6
Sugar	7
Sugar industry	8
„ bounty	9
Rice	10
Grain	10
Liverpool salt	11
Oak staves	11
Coal	12
Clothing trade	12
Drugs	13
Cotton-seed	13
Linseed	13
Spices	13

ABSTRACT of Contents—continued.

	Page
Opium and quinine	13
Turpentine	13
Alcohol	13
Crockery	13
British imports	13
Exports in British ships	14
Ocean freights	14
French line	15
Financial remarks	15
Yellow fever	16
Quarantine	17
Rapid transit	18
Convict labour	19
The banana trade	20
Bridge over the Mississippi	20
The great storm of 1893	21
Rates of wages	23
Health statistics	24
Weather statistics	25
Shipping returns	25
Louisiana Lottery Company	27
Pensacola—	
Timber trade	28
Coal trade	29
Export trade to Cuba	29
Imports	29
Shipping and navigation	30
Relative to treaty for return of merchant seamen deserters	30
Act appointing shipping agent	30
General remarks	32
Tables	32
Mobile—	
Cotton	36
Lumber	36
Shipments	37
Timber	37
Staves	38
Naval stores	38
Vegetables	38
Fruit	39
Harbour improvements	39
Shipping	40

Trade and business of New Orleans.

The following report of the trade and business of New Orleans has been collected from articles that appeared from time to time in the local Press during the year 1893, and especially in the "Times Democrat," a leading journal in such matters.

It has been a year with both good and bad features: the latter, however, were not confined to New Orleans alone, but shared by all sea-port towns, particularly those in the South.

A falling-off in exports, owing to the low price of cotton, is apparent; but on the other hand there has been a large increase in imports, with a promising growth in its grain trade; greater activity in manufactures, and the largest amount of building ever done in a single year.

The receipts of domestic produce show a total of 150,321,781 dol. (30,064,338*l.*), against 204,037,492 dol. (40,807,498*l.*). This is a decrease of upwards of 10,000,000*l.*, and the worst

shown for many years. The sugar, it is true, has been estimated without bounty, so that the actual value of domestic produce may be considered about a million and a half sterling higher.

The decrease from last year is due almost wholly to cotton. The receipts were then 2,711,395 bales, worth 101,812,882 dol. (20,362,576*l.*); whereas for the past twelve months, that is to say, counting from September, 1893, they have been only 1,374,850, or barely half as much in bales.

There was a large increase in the export of wheat, but the price of cereals so declined as to cause an actual loss in the value of exports of 5,983,145 dol. (1,196,629*l.*).

It may be said that owing to the low price of cotton a falling-off in the general trade took place.

The Auditor of Customs of New Orleans reports on the value of imports and exports for the year 1893, showing that New Orleans is the second city of the United States in exports, and the fifth in imports. The value of the former being 85,229,286 dol. (17,074,257*l.*), and the latter, 21,151,386 dol. (4,270,277*l.*).

The total arrivals of vessels during the season were 1,228, of 1,566,624 tons, of which 302 vessels of 555,449 tons were coast-wise, and 926 of 1,011,175 tons from foreign ports.

The total value of the commerce of New Orleans during the year ended September, 1893, amounted to 479,819,877 dol. (96,000,000*l.* about); that is to say, 95,785,661 dol. (20,000,000*l.* about) less than the previous year, due principally to the low price of cotton.

As for local business it has been good, and better than the previous year. There has been the heaviest building business ever done in New Orleans, which is always a good sign. Real estate has maintained its value, and stocks and bonds have generally remained firm. A still surer test, always accepted as proof of the amount of business done in a town, are the bank clearances, which, for the year ending August, 1893, amounted to 527,836,300 dol. (105,567,260*l.*), proving a better business than for any of the past four years (save in 1891, when the clearances amounted to 531,764,118 dol. (106,352,825*l.*), notwithstanding a period of stagnation created by stringency in the money market, which New Orleans was the last to feel. Few of its industries have been affected. Its business has continued active, and no difficulties have been encountered in marketing the crops of the country tributary to it, which were most abundant promising a good season.

Cotton is, and will be for a long time to come, the principal product and export of the Southern States. After that sugar, then lumber, rice, and other article. Cotton.

The following table shows the export of cotton during the season of 1892–93, from sea-ports in this Consular District:—

State.	Great Britain.	France.	Continent and Channel.	Total.
	Bales.	Bales.	Bales.	Bales.
New Orleans	614,247	340,752	383,601	1,338,600
Mobile and Pensacola..	43,696	..	400	44,096
Total	657,943	340,752	384,001	1,382,696

The total export of cotton from this Consular District during the above-mentioned season amounted, as shown, to 1,382,696 bales; whereas, during the previous season, 1891-92, it reached 2,200,725 bales; that is to say, a decrease, during the last season, of 818,029 bales.

Cotton mills. The cotton consumption in the South appears to be on the increase, and no ill effect was felt by the mills in operation from the unsatisfactory state of the money market, though some apprehension existed at the time among millowners that there would be difficulty in disposing of goods; but the result showed there was no real cause.

It appears that no manufacturing industry is safer or more rapidly growing in the South. This is accounted for by the fact that it pays better to erect a mill in close proximity to the cotton fields, than to transport the bulky raw material to distantly situated manufactories. Five years ago (1889–90) Southern mills, according to the New Orleans Cotton Exchange, consumed 480,000 bales; whereas during 1893, though conditions were against them, they used 744,000 bales, showing an increase of 264,000 bales.

Spindles. Last year 173,467 spindles were added to those already in operation, showing that the growing consumption of cotton in these States is an established fact. It is presumed that no less than 150,000 new spindles will be brought into play in the Southern States before long.

The following tables show total of mills, looms, spindles, and consumption by States in this Consular District: —

MILLS.

State.	Total.	Old.	New.	Idle.	In Operation.
	Number.	Number.	Number.	Number.	Number.
Alabama	28	20	2	4	2
Arkansas	3	1	..	2	..
Louisiana	4	4	..	..	
Mississippi	11	7	..	4	..
Total	46	32	2	10	2

SPINDLES.

State.	Total.	Old.	New.	Idle.
	Number.	Number.	Number.	Number.
Alabama	164,712	129,632	30,280	4,800
Arkansas	8,800	3,000	..	5,800
Louisiana	52,800	52,800	..	..
Mississippi	61,492	53,692	..	7,800
Total	287,804	239,124	30,280	18,400

The spindles now (September, 1893) in operation in the Southern States are 2,171,147, against 1,998,680 at this time last year.

The following shows the consumption of mills in this District during the past two years, in pounds:—

State.	Quantity.
	Lbs.
Alabama	24,449,891
Arkansas	382,500
Louisiana	6,862,896
Mississippi	7,479,423
Total	39,174,720

RETURN showing Weight of Bales during the Year 1892–93.

State.	Number of Bales.	Average Weight.	Quantity.
			Lbs.
Lousiana	1,602,079	499·94	800,943,375
Alabama	171,585	502·00	86,135,670
Florida and Georgia	947,469	485·98	460,450,985

The actual growth and in stock of cotton in 1891–92 amounted to 9,000,000 bales; whereas in 1892–93 it amounted to 6,750,000 only, showing a decrease of 2,250,000 bales.

Cotton bale packing.

While on the subject of cotton bales, it may be of interest to those engaged in the trade to know that the question of packing and baling of cotton in this country has quite recently engaged public attention in consequence of the intervention of the United States Government in not allowing improperly covered bales to be exported in steamers authorized to carry passengers. The record of the Cotton Exchange shows a material decrease in the size of bales which for the present season, 1893–94. are exactly 500 lbs. in weight, against 505 last year. Most of the complaints about the careless packing of cotton from this

country are said to come from England and also from France, where American packing compares unfavourably with Indian and Egyptian.

The "Times Democrat" of New Orleans has taken up the question of the alleged bad packing of American cotton, and, in a vigorous article that appeared on the 5th of January, 1894, points out how injuriously it affects American cotton abroad, and that the time had come for some reform. This seems to be more generally recognized now than formerly, as the bales instead of growing larger have latterly become smaller, as already mentioned in this report.

Cotton bale packing and passenger ships.

While on the subject of bad packing of American cotton it would be well to mention that a law exists in this country by which a passenger ship can be fined 1,000 dol. for taking on board bales badly packed; whereas ships not carrying passengers are allowed to take bales of cotton in any condition.

The object of this law is to protect passengers' lives. It may be asked, Are the lives of sailors of less importance?

What is much needed is that Congress should pass a law to compel the better packing of cotton bales, with the view to all vessels being treated alike. As the law now stands passenger ships are heavily handicapped. They must either give up passengers or cargo.

SUPPLY and Distribution of Cotton from September 1 to December 31, 1893.

SUPPLY.

Description.	Quantity.		
	1893.	1892.	1891.
	Bales.	Bales.	Bales.
Amount of crop brought into sight during 4 months ending December 31	5,419,652	4,790,455	6,446,086
Stocks at ports and principal interior towns left over from last crop	309,956	532,951	278,376
Total	5,729,608	5,323,406	6,724,462

DISTRIBUTION.

Exports to—	Quantity.		
	1893.	1892.	1891.
	Bales.	Bales.	Bales.
Great Britain	1,537,727	1,343,742	1,915,101
France	357,910	300,752	321,380
Continent, &c.	872,650	680,162	879,542
Total exports (4 months)..	2,768,287	2,324,656	3,116,023
American spinners took up the same period	1,256,025	1,394,435	1,667,117
Stocks at the United States ports and interior towns, December 31..	1,705,296	1,604,315	1,941,127

The production of sugar for the fiscal year 1893 compares as follows with that of 1892 :— Sugar.

Class.	Quantity.	
	1893.	1892.
	Lbs.	Lbs.
Cane sugar	450,000,000	364,829,411
Beet „	27,083,322	12,008,438
Sorghum sugar	985,900	1,136,086
Maple sugar	3,200,000	144,882
Total	481,179,222	378,115,217

The above is an increase in production of 103,000,000 lbs. under the influence of existing bounty.

The amount of bounty paid on sugar for the fiscal year ended June, 1893, on the cane sugar of Louisiana was 8,584,860 dol. (1,716,970*l.*), on the cane sugar of all the Southern States 8,763,830 dol.; showing that Louisiana as a sugar-growing State is far in advance of all the other States put together.

The sugar-crop of 1892–93 aggregated 487,255,926 lbs. of sugar, of which 88,268,995 lbs. were made by the old process, and 398,986,931 lbs. by modern apparatus.

Factories using the old process in 1892–93 obtained an average of 61 gallons of molasses per 1,000 lbs. of sugar. Those using the modern apparatus, 32 gallons.

The total production of molasses for 1892–93, was 18,151,991 gallons. During the same period factories using the old process averaged 1,111 lbs. of sugar per acre, or 108 lbs. per ton of cane. The average with the modern apparatus was 2,718 lbs. per acre, or 150 lbs. per ton. The average yield of

cane per acre was 18 tons. Total acreage of cane ground was 226,244 acres, or 3,477,218 tons.

There can be no doubt that New Orleans, sooner or later, will become a great sugar-manufacturing centre, as it is in a position to distribute refined sugar through a very large territory without fear of competition, provided it is not interfered with by transportation companies. Genuine molasses is gradually lessening from year to year as an article of consumption. Most of it passes into the hands of re-boilers, as I stated in my report of last year, to be manipulated. This trade, owing to the greater use of centrifugal machinery, is becoming smaller every year. The bounty on sugar has been a considerable factor in not only the reduction of the production of molasses, but also in the quality, which at times has been so inferior as to become unsaleable.

FREE Sugar Imports from August, 1892, to August, 1893.

Description.	Quantity.	Value.	
		Currency.	Sterling.
Cane sugar	Lbs. 219,456,677	Dollars. 8,136,401	£ 1,627,280

DUTIABLE Sugar, same Period (above No. 16 D.S. in colour: duty ½ c. per lb.).

Description.	Quantity.	Value.	
		Currency.	Sterling.
Cane sugar	Lbs. 135,908	Dollars. 5,142	£ 1,028

Sugar industry

The sugar industry is peculiar to Louisiana, as far as this country is concerned; for although beet sugar and maple sugar are made in considerable quantities in other parts of the Union, their combined product is far below that of the State of Louisiana, where the conditions as to climate and soil are most favourable.

The sugar industry has for years been an important one in this State. Its cultivation, preparation for the market on the large plantations, and more particularly at New Orleans, give employment to a considerable portion of the population, as we shall presently see.

The growing and handling of the crop of sugar produced from Louisiana cane is not by any means the only branch of the sugar industry represented in this State and Port. One of the great manufacturing establishments of New Orleans is the "American Sugar Refinery."

In this establishment, not only the product of the Louisiana cane-fields, but also that of hundreds of acres in Cuba is prepared for the market. These buildings occupy no less than five squares of ground, some of them being ten stories high. Within its walls employment is given to no less than 2,000 men, thus some 10,000 men, women, and children are supported. From 1,500,000 to 2,000,000 lbs. of sugar are turned out daily.

It draws its supplies from Cuba and Louisiana. The refinery buys the crop of the planters, paying all freight charges from the time it leaves the plantation, whence the raw sugar is sent to the refinery, where it is submitted to an expert chemist employed for the purpose, and polarized.

The returns are at once made out, the planters being credited with the market price.

Bounty on sugar.

The bounty provided by the law of 1891, was in the nature of a contract made by Congress with each and all persons who would engage in the production of cane, beet, or sorghum sugar of certain saccharine strengh, who should under that contract receive the bounty provided for by the appropriation from the Treasury.

Under the provisions of this understanding, which should run until 1905, large amounts of money have been invested, and a larger amount of sugar has been produced during the past three years than in an equal period before.

All those interested in the production of this article appear now to be in a great state of agitation caused by an impression, whether well founded or not, that Congress purposes to withdrawn this bounty, and to give nothing in its place; this, however, is in some quarters much doubted, and time only can show what will be decided upon.

The planters now abandon all hope of about two cents a pound bounty for sugar, past, present, or future; or for protection from foreign sugar by a duty of 1 c. to 1½ c. (½*d.* to ¾*d.*) per lb., which is absolutely necessary for that industry to flourish in the Southern States; for they cannot compete with Cuba where labour is far cheaper.

It was in the interest of the great refineries that sugar was put on the free list by the Republicans, at the time of the McKinley Bill, and it is for their benefit that it will be kept where it now is—so say the planters, who declare that they would prefer the above-mentioned duty to 2 c. a lb. bounty, even if they were sure of being paid.

The battle is now carried on by the Republicans, who favour the refiners, and the Democrats, who favour the planters.

Rice.

There has been a rapid increase in the production of rice in the Southern States, more particularly in that of Louisiana, where the climate, soil, and the topography of the country all contribute to the result that this State is the most important producer.

Since the season of 1877–78 up to 1892–93 the product of Louisiana has increased from 233,707 sacks of rough rice to about 2,000,000. But the demand for rice has not kept pace with the increased product, so that during last season there was a depression in prices. At the present time (January, 1894), however, there is a noteworthy advance. Were it not for the general depression that prevails all over the country a materially higher range of prices than anything yet experienced this season might be looked for.

Reports from the country agree that the stock remaining is very small in comparison to what it usually is at this time of the year. Up to the present time 680,000 sacks of rough rice have been received, compared with 1,400,000 for the same period last season, 1893.

The crop for the present year (1894) will be far less than the yield of 1892–93.

While some of the decrease in the production of rice has been due to the abandonment of the industry along the Mississippi river, where sugar-planting has proved more profitable, the principal cause was the protracted dry weather during the growing season.

There appears to be an increased consumption of rice. Based upon the sales of 1892, no less than 250,000,000 lbs. are now required in this country, so that, as previously stated, the crop estimated for 1894 only reaching 680,000 sacks, at 180 lbs. to the sack = 122,400,000 lbs., the supply will not be sufficient for the demand.

The past season of 1892 was an extraordinary one, whether as to size of the crop or as to the abnormally low price of three cents on an average for clean rice, while at times rough rice was almost unsaleable, even as food for stock. The present crop was estimated in September, 1893, at one million to one million and a quarter sacks. The supply in January, 1894, is not sufficient for the demand, and prices are, consequently, going up.

New Orleans as a grain port.

The recent bulletin showing the principal exports of the country during the calendar year 1893, affords information on the part that New Orleans has played.

As was expected the total grain exports of the country fell off considerably when compared with 1892, owing to the smaller demand from Europe. Taking only wheat and corn, the exports for the entire country showed a loss of more than 20 per cent. compared with 1892.

All the leading ports of the United States, except Boston, lost in grain exports. New Orleans lost, relatively, less than

other ports, the decrease in shipments here being only 20 per cent., while in other great ports, Boston always excepted, the loss was from 25 to 60 per cent.

The following table, showing the exports of wheat and corn combined, from the five principal Atlantic ports, gives the relative standing with 1892 :—

Port.	Quantity.	
	1893.	1892.
	Bushels.	Bushels.
Baltimore	20,525,105	35,657,406
Boston	9,440,090	9,186,400
New Orleans	19,403,067	21,588,161
New York	49,988,746	53,553,319
Philadelphia	9,646,804	29,448,719

From these figures it will be seen that instead of being a moderate fourth as in 1892, New Orleans has risen to be a close third.

There has been no improvement in the Liverpool salt trade at this port. On the contrary, a falling-off in the imports. This section of the country is greatly stocked with American salt. Liverpool salt.

The demand being light, prices, though very low, have tended down.

		Quantity.		
		1893.	1892.	1891.
Receipts—				
Liverpool	Sacks ..	141,000	150,000	156,000
Stock, August 31—				
Liverpool	„ ..	57,000	72,000	82,000
Turks Island	Bushels ..	6,500	9,000	10,000

Several cargo lots of Turks Island were offered here during the season, but, finding no bidders, were placed elsewhere.

This article has been almost entirely driven from the market and replaced by a cheap low-grade domestic one.

The total exports of oak staves from New Orleans to foreign and domestic ports for the season ended August 1, 1893, were as follows :— Oak staves.

Country.	Quantity.	Value.
	Pieces.	£
United Kingdom	1,202,958	..
France	322,277	..
Spain	3,032,600	..
Portugal	1,848,313	..
Germany and Holland	184,456	..
Belgium	7,410	..
Italy	63,500	..
Domestic	314,352	..
Total	6,975,866	208,000

A large part shipped to domestic ports was subsequently re-shipped for foreign ports.

Coal. The amount of coal received at New Orleans is about 12,000,000 bushels.

New Orleans has always had an excellent coal supply from Pennsylvania and West Virginia mines, usually known as "Pittsburg" coal.

The prices of Pittsburg coal have been 30 to 35 c., against 32 to 40 c. per barrel 1891–92; against 25 to 35 c. per barrel in 1890–91.

Clothing trade. There has been a very steady demand for clothing, and manufacturers have had their hands full in delivering goods that were sold on which orders had been taken.

The principal branch of the business here continues to be the manufacture of jeans for domestic use. This article, on account of its cheapness, and fitness for working people, is very much in demand, and can be made 25 per cent. cheaper here than in the North.

The following figures indicate the clothing trade at New Orleans :—

	Number.	Number of Hands.	Capital.
			£
Wholesale manufactories ..	30	5,000	1,200,000
Retail manufactories	25	1,000	240,000
Wholesale not manufactured ..	6	150	120,000
Total	61	6,150	1,560,000

Besides the above there are a number of smaller houses and little retail stores at New Orleans that would make the aggregate of capital employed over 1,600,000*l.* which is turned over about three times a year and would run up the clothing business here annually to over 5,000,000*l.*

Drugs. A review of the fiscal year 1892–93 in drugs and chemicals shows a slight increase over the corresponding period last year. The volume of business has been, on the whole, very fair.

The export trade with Mexico shows a large increase; while with Central and South America it has fallen off, owing to revolutions and depreciated value of specie.

Importations are good, especially in chemicals and heavy goods.

Cotton-seed. Cotton-seed oil is in good demand, and prices are higher than ever obtained before.

Linseed oil. Linseed oil, after remaining up to its highest point during the last two years, declined six cents (three pence) per gallon the present month (September, 1893).

The possible re-appearance of cholera caused a demand for chloride of lime, copperas, carbolic acid, and various other disinfectants. While prices held firm, there was no advance in any of the articles mentioned.

The appearance of the cotton-worm early in August caused a demand for Paris green.

Spices. Spices were very low. Pepper, cloves, and allspice being easier than ever shown before. Cassia bark and ginger advanced two to four cents (one penny to two pence) per pound.

Opium and quinine. Opium and quinine, after fluctuating for several months with an upward tendency, settled down to prices decidedly to the advantage of buyers. Both are extremely low.

Turpentine. Turpentine, owing to small distilleries being unable to secure advances to market their products, has reached the lowest figure ever known.

Alcohol. Alcohol, after a futile effort on the part of the Whiskey Trust to maintain a high price, dropped 46 c. (nearly 2*s.*) per gallon.

Crockery. While the crockery trade has not been so large as anticipated, yet it has been satisfactory. Owing to low prices of cotton, rice, and other agricultural products, people were not in a condition to make extensive purchases of goods, and governed themselves accordingly.

The outlook in this line of business, however, is brighter. Orders to replenish depleted stocks will probably be plentiful, and at satisfactory prices.

British imports. There can be no doubt that the McKinley Bill has been most disastrous to British merchants, who before that Bill came into force were in this country carrying on a thriving trade.

A very large stock of goods remains that cannot be disposed of, except at a great loss, for a heavy duty has been paid on it. British merchants who were wholly dependent on the trade will now have to dispose of their goods at a considerable sacrifice, and close their establishments so far as limiting their enterprise to the importation of British manufactured goods only. A certain amount of such as are indispensable will always find a ready market, but that can only be tacked on to the general business, and cannot be exclusively carried on by any one firm.

With regard to what in this country are called dry-goods, *i.e.*, stuffs of various descriptions, the United States are becoming almost independent of Europe for the supply of such articles. Silk goods at 20*s.* a yard are manufactured at Paterson, New Jersey. Very little of this is now imported from France, except silk picked out with gold, and sold at 30*s.* a yard; but there is little demand at New Orleans for such stuffs. They appear to be used principally for adorning shop-windows, an art which I have never seen equalled elsewhere.

RETURN of the Principal Exports Carried in British Ships during the Year 1893.

Articles.		Quantity.
Cotton	Bales	1,162,875
„ seed	Sacks	347
„ „ oil	Barrels ..	34,961
„ „ cake	Sacks	129,459
„ „ meal	„	434,005
„ „ soap stock	Barrels ..	8,134
Corn (in bulk)	Bushels ..	5,423,648
„	Sacks	35,174
Wheat	Bushels ..	10,106,034
„	Sacks	14,020
Oats	„	69,375
Flour	„	31,719
Staves	Pieces ..	2,116,414
Timber	Logs	4,087
„	Pieces ..	7,808
„	Planks ..	1,020
„	Feet	22,000
Lumber	Logs	772
„	Pieces ..	200,739
„	Loads	321
„	Bundles .	1,145
„	Feet	2,514,664
Lead	Pigs and bars	1,560
Copper ore	Sacks	17,574
Tallow	Tierces ..	2,062
Tobacco	Hogsheads ..	200
Rice polish and rice bran	Sacks	27,992
Molasses	Barrels ..	49,325
Tannin root	Sacks	36
Phosphates rock	Tons	12,000
Resin	Barrels ..	4,400
Hay	Bales	1,163
„	Tons	950
Moss	Bales	150
Hides	Hogsheads ..	1,048

Ocean freights.

The season of 1892–93 saw the lowest rates of freight for cotton that have ever prevailed.

The months of October, November, and December, usually the best for ocean-carriers, proved to be the worst of the season; this was principally the case with cotton freights.

Grain rates, while not ruling high, kept up fairly well. Oil cake freights were very low.

The short cotton crops in the districts contiguous to this port caused a great scarcity of this article, also of cotton-seed oil. Stave freights were very scarce, but picked up in the last half of the season.

A French line of steamers.

"Les Chargeurs Réunis" propose to place in the New Orleans trade large steamers, which will sail upon fixed dates, and as soon as the business has been well established, reduce the time between this port and Havre to fourteen days. This line also proposes to carry passengers, and provide every convenience and accommodation for that purpose.

The new enterprise, it is thought, will prove a valuable addition to the commerce of New Orleans, as it will not only afford a number of large ships, compared to the usual "tramp" for the export trade, but by leaving Europe for New Orleans on regular sailing days, will create a good import trade, and enable goods to arrive direct from Europe instead of coming by New York.

In addition to the above line between this port and Havre, the French Company proposes to start lines between New Orleans and Brazilian ports as well as the Argentine Republic.

It will be convenient for the import of coffee intended for the Pacific coast, as such imports can be handled more expeditiously through New Orleans than by rail from New York; as well as for the wool trade for the Argentine Republic.

The New Orleans and Havre Line has already been inaugurated by the arrival of the s.s. "Canarias" 4,000 tons, which left this port on her return voyage on the 6th of March, 1894.

Financial remarks.

The failure of the Barings, which so greatly affected the financial world, naturally caused the rates of money—owing to an abundance lying idle from timidity in investments—to drop to unheard-of low figures. This country, however, was not immediately affected until the Lancashire cotton strike, and the enormous export of gold from this country to Europe.

The semi-annual, July 12th report, under special call of the bank examiner, excited general interest in financial circles, owing to New Orleans securities being not only maintained, but advanced. This is evidenced by the firmly-maintained values of real estate, and the general confidence of capitalists.

In connection with local finances there appears to be an improved condition at New Orleans, where its new 4 per cent. Constitutional bonds were disposed of at par and accrued interest.

The floating of these bonds, it is said, places New Orleans in a very good position as regards its credit and resources.

Bank shares were generally well maintained, and, in some instances, improved. Insurance companies, though meeting with many heavy losses, held their own pretty well, so did street-railways, and miscellaneous stocks, with the exception

of New Orleans Brewing Stock, which declined considerably. Both New Orleans and State securities, however, are considered as offering good values for investments.

Yellow fever.

The following statistical summary of the mortality in New Orleans of yellow fever during the last thirty years may be interesting as showing how diseases of the classes known as "preventable" can be stamped out of a community altogether.

The statistics are derived from the Board of Health, whence they have been supplied to the "Times Democrat," an admirable journal for statistics of every kind.

The ravages from yellow fever during the past thirty years are as follows:—

DEATHS from Yellow Fever.

Years.	Number of Deaths.
1863..	2
1864..	6
1865..	1
1866..	185
1867..	3,107
1868..	3
1869..	3
1870..	588
1871..	54
1872..	39
1873..	226
1874..	11
1875..	61
1876..	42
1877..	1
1878..	4,046
1879..	19
1880..	2
1881..	0
1882.	1
1883..	4
1884..	1
1885..	1
1886	..
1887..	..
1888..	..
1889..	1
1890..	..
1891..	..
1892..	..
Total	8,404

These tables tell their own story. The deaths from yellow fever that amounted to 398 per annum in the decade of years 1863–72, rose to 440 per annum in the following decade, and declined to less than 1 death per annum in the decade ended 1892; moreover, the seven cases of deaths mentioned as having occurred during the last decade were all imported.

This successful attempt in stamping out yellow fever at New Orleans is due to the admirable quarantine precautions taken on the arrival of vessels from foreign ports, especially the West Indies.

Complaints have been made at this office, and elsewhere, by British shipowners and masters, that the dues charged for fumigation, namely, 100 dol. to 150 dol. (20*l.* to 30*l.*) on ships coming from infected ports, were excessive. The law for inspection and fumigation allows charges such as to approximate the cost of maintaining the quarantine system. From inquiries made on the subject, I am satisfied that the present charges only just defray the costs of an admirably conducted though expensive establishment; and that it is to this establishment that is due the present sanitary condition of this port.

Surely it is more economical to pay 20*l.* to 30*l.* for fumigation, and stop at the Quarantine Station for three days only, than to be detained ten days, as formerly.

The agents of the principal British liners inform me that the saving by the present system, though they pay annually 1,200*l.* for fumigation, is far preferable, and that it would be against their interests were the question of high charges raised by vessels coming here at long intervals, or perhaps never returning after their one visit, especially as there is every probability, I am told, of a reduction of charges as soon as circumstances will permit.

Quarantine.

Quarantine. The Biennial Report of the Board of Health for the State of Louisiana, will not be published before the end of March, 1894, which would make it too late for this report; but, on reference to that of 1892, it appears that the policy of the Board of Health has been to make quarantine as light a burden to commerce as it is possible to do. Being authorized by law to reduce quarantine fees when the revenues of the Board should warrant it, the Board, at its meeting held in the winter of 1891–92, upon the recommendation of the Quarantine Committee, reduced the inspection fees of steamships from 4*l.* to 3*l.*, and of barks from 3*l.* to 2*l.* 10*s.*

A still further reduction was proposed should the number of ships arriving in this port increase; without detriment, however, to the quarantine service.

The Board has fostered commerce in every way compatible with what is considered safety to the public health, and a remark has been made that while foreign ships have not always appreciated the full importance of the regulations of the port, they have yielded a cheerful acquiescence to local demands.

As above stated a few vessels, however, have raised the

question of excessive quarantine charges. But it would be well to remind masters of British vessels coming to this port, especially for the first time, that the quarantine charges are only such as are necessary for the service, and that the agents of the regular British liners at New Orleans, who are far more interested in the matter than occasional comers, keenly watch any opportunity that may offer to suggest a reduction of the quarantine fees.

The following advice, which it would be well that British mariners should attend to, is given by the Board of Health:—

1. Vessels should be stripped during the quarantine season of all woollen hangings, carpets, curtains, and such-like material.
2. Masters of vessels should instruct passengers from quarantine ports to dispense, as far as possible, with baggage that can be injured by wetting while undergoing disinfection, and warn them against furs, silks, skins, laces, velvets, and other fabrics of delicate texture, as they will be compelled to assume all risks of injury.
3. While in ports affected with yellow fever, vessels should be anchored out in the harbour, when this is possible, and the crew prohibited from going on shore, especially at night.
4. When practicable, cargoes should be loaded in such a manner as to allow access to the pumps, and also to enable the quarantine officials to pump out and wash the bilge.
5. Masters, in order to avoid delay at the quarantine station, should see that the bilge is thoroughly pumped out and cleaned, and that the entire vessel should be put in such good sanitary condition as to permit of the least possible detention.

Rapid transi

The question of rapid transit is engaging the attention of all large towns. Ordinary street cars and the omnibus are now getting out of date, and gradually being superseded by vehicles propelled by electricity. When a town grows to such dimensions that a busy man has to travel several miles to reach the business quarter, it is important to him that the time thus lost should be reduced to a minimum, especially to those whose limited incomes compel them to seek homes at a distance where rents are less expensive, and they can breathe pure air. In old European towns, where the streets are narrow, such a change is difficult, not to say impossible; but in this country care has been taken to keep the streets wide.

In New Orleans there is at present only one electric car line running, that is in St. Charles Avenue, some four to five miles but before long, that is to say, two years, all the mule cars will where practicable, be replaced by 20 horse-power electric cars

running 12 miles an hour, at a uniform rate of 5 c. ($2\frac{1}{2}d.$) for any distance.

It would be impossible to estimate the advantages that accrue to a large town by a rapid transit from one end to the other. The reduction of the item of rent in household expenses will always be an inducement to the middle and labouring classes to patronize such means of locomotion. It is they who after all will chiefly contribute to the prosperity of such undertakings. Unfortunately for the travelling public in this country, there exists no law against the over-crowding of these conveyances. The carriages at certain hours of the day are so full, there being such a rush to get home after business hours, that a scramble takes place for standing room, and yet cars follow each other in rapid succession.

This may be accounted for by the desire of the public to avoid, if possible, returning to their home by the old-fashioned omnibus.

As a matter of fact the public will rather walk a considerable distance to catch an electric car, than step into an old-fashioned one that passes the door, as it is more rapid and offers greater comfort.

Another very great advantage offered by the new system is that it obviates the necessity of using horses or mules, which is always and unavoidably attended by a certain amount of cruelty.

Convict labour.

In the State of Louisiana convicts can be leased out for private enterprise; but there is a profound and growing opposition to the existing system; and it is probable that the next session of the Legislature will be occupied with the question of putting a stop to it. The experiment now being made in the State of Mississippi, which is drawing attention here, may as well be described.

The General Assembly is now engaged in making provision for the resumption by the State of Mississippi of direct custody of its convicts that have heretofore been leased out. The proposition most in favour is to establish a State farm in connection with workshops and the general prison buildings. For such a purpose lands to the extent of 5,000 acres will be purchased.

There has always been a complaint that convict labour is seriously affecting free labour, and, consequently, that a wrong is being done to the honest worker. This has been constantly met with the statement that either convicts should be made to earn their own support, or be maintained in idleness at the expense of the tax-payers. The former system appears to be the more expedient one of the two, and will probably be adopted; but in such a manner as to conflict with free and honest working-men as little as possible. A State farm, it is considered, would seem to offer the best means of securing the desired object, and the attention of law-makers in the State of

Louisiana is now being drawn to the experiment about to be tried in that of Mississippi.

The banana trade.

Owing to the efforts of rival southern ports to capture a portion of the banana trade of New Orleans, the extent and importance of that trade have attracted no little attention recently.

According to the figures given in a pamphlet published by the New York House of Hurlbut & Co., the total importations of bananas at New Orleans during 1893 amounted to 5,025,217 bunches as compared with 4,483,351 bunches in 1892; 3,735,841 in 1891, 3,668,462 in 1890, and 2,946,058 in 1889. It will thus be seen that within five years the business in this port has very nearly doubled. It is probable that should the increase continue during the next few years the importations here will soon reach one-half of the total of the United States.

Though not a banana-growing State, Louisiana, from its contiguity to the West Indian Islands, British Honduras, and other States, offers great facilities for importations by sea, and distribution among all the United States by rail.

New Orleans now leads the way in this important trade.

Bridge over the Mississippi.

In last year's report mention was made that Congress had passed the Act authorizing the bridging of the Mississippi River at any point above the limits of the town of New Orleans within five miles, intended for the use of railways only.

This important undertaking, if the necessary funds can be raised, will now shortly be commenced, and the works be superintended and carried on by Mr. E. L. Corthell, the designer, President, and Engineer-in-chief.

The bridge will be a double-track railroad structure, crossing the Mississippi River nearly five miles above the city of New Orleans. It will consist of one channel span and two shore spans, supported by two river piers and two shore piers.

As the Government requires that it should be at a height of 85 feet from the river, and the channel span no less than a thousand feet, a cantilever design for the main structure has been determined upon; the river at that point being 2,400 feet wide; and the maximum depth at the river piers about 100 feet. The river bed consists of sand and clay.

The entire length of the work from the connection with railroads east and west of the river being six and a half miles.

The length of the steel structure will be over two miles.

The placing of foundations that must permanently support such a structure crossing a river like the Mississippi near its mouth, where the bed is composed of alluvium, is a difficult and interesting question, but not one that cannot be solved in a satisfactory manner by so able an engineer as Mr. Corthell, though the piers will sink respectively 80 and 90 feet into the earth, and above their points of exit from the bottom of the river will be respectively 90 and 80 feet of water to the low water line, and 438 feet from the metal cutters at the bottom of the cribbing to the utmost height of the superstructure.

The channel span will be 1,070 feet centre to centre of piers, or 1,044 feet in the clear at low water. It will be formed of two cantilever arms, each reaching out 270 feet from the piers, and supporting a central span 530 feet long.

The shore spans which act as anchorages for the cantilever arms, are about 600 feet long. They are of such length and weight that there will never be, under any position of train-load, any up-lift at their shore ends.

The superstructure will contain about 25,000,000 lbs. of steel and iron.

The estimated cost of this bridge is something over 1,000,000*l.*

In a financial point of view there is every reason to believe that it will be a success, as railroads are fast superseding the river in traffic, and the commerce of New Orleans is increasing year by year as the following figures will show. In 1876 the river traffic at New Orleans amounted to 5,115,886 tons, whereas in 1892 it scarcely reached 3,153,261 tons. The sea commerce for 1876 was 1,908,114 tons, and 1892, 3,333,658 tons. The commerce of New Orleans by ocean, river, railroads, and canals increased 2,988,524 tons from 1876 to 1892; and its value during the same period 36,370,000*l.*

It will take three years to complete the bridge.

The Board of Directors of the Bridge Company will, it is presumed, soon take the necessary steps to issue the bonds and stocks, so that the contracts may be let and the preliminary preparations for the work be made, with the view of sinking at least one of the two great river piers before the high water of next spring; otherwise a whole year will be lost.

The "Phœnix Bridge Company" have, it is said, offered to execute the superstructure and understructure for 892,690*l.*

The great storm, 1893.

The storm that took place in New Orleans on Sunday, October 1, 1893, was a light breeze in comparison with the terrific hurricane that passed over the section of country around Point-à-la-Hache, at the mouth of the Mississippi River.

The wind there assumed the proportions of a tornado, blowing at the rate of between 100 and 125 miles an hour. The loss of life, and damages caused by the wind and a tidal wave, were vast in extent. Those who inhabited that coast and adjacent islands were of almost every race: Anglo-Saxons, Malay Creole, Negro, Austrian, Italian, Chinese, Spanish, and German. There they reared their "Camps" or fishing huts on piles, to have them beyond the reach of the high spring tides.

It would take too much space to describe in detail all the horrors and misery that these poor people, men, women, and children, went through.

It is impossible to calculate, even approximately, the loss of property occasioned by the hurricane in a few hours, but the loss of life can be estimated. No less than 1,607 are known to have perished in the twenty-four hours, their names being given; but the exact number can never be known.

The whole Gulf coast, from Barataria Bay to Mobile, as well as both banks of the Mississippi River, were strewed with the bodies of the dead. Men, women, and children, drowned or mangled beyond recognition by the huge logs and house timbers, were found on the devastated fields, marshes, and swamps.

Relief parties at once set out from the country round about. Many were rescued, food and clothing distributed, and the injured looked after.

Large subscriptions were organized, and no less than 65,000 dol. (13,000*l.*) were distributed, besides clothing, bedding, and other necessary articles. For this purpose a New Orleans Citizens' Relief Committee was formed, with Mr. Robert Bleakley as chairman, by whose prompt action and untiring energy much help was afforded to the homeless.

Rate of Wages.

Occupation.		Amount. From— £ s. d.	Amount. To— £ s. d.	Remarks.
Clerks—				
Bank	Per month	15 0 0	60 0 0	
Warehouse	Per week	1 18 0	2 10 0	
Dry goods, jewellers, fancy stores, and shops	„	3 0 0	4 0 0	
Office	Per month	5 0 0	40 0 0	
Domestic servants—				
Cooks, female	„	..	3 0 0	With board
Sewing girls	Per week	0 12 0	1 0 0	With board
Nursemaids	Per month	1 12 0	2 0 0	With board
Housemaids	„	2 8 0	3 0 0	With board
Washerwomen	Per day	..	0 3 0	With board
Coachmen	Per month	..	6 0 0	Board and livery
Stablemen	„	..	4 0 0	And board
House carpenters	Per day	..	0 10 0	
Ship carpenters	„	..	0 12 0	
Bricklayers	„	..	0 16 0	
Plumbers	„	..	0 12 0	
Pipe-layers and gas-fitters	„	..	0 10 0	
Painters	„	..	0 11 0	
Paperhangers	„	..	0 12 0	
Stonemasons	„	..	0 10 0	
Upholsterers, cabinet-makers	Per day (average)	0 12 0	0 16 0	By the job
Bakers	Per week	2 8 0	3 0 0	
Boiler, copper, iron, and foundry hands—				
Machinists	Per day	0 10 0	0 14 0	Paid weekly
Iron moulders	„	..	0 12 0	Paid weekly
Coppersmiths	„	0 13 0	0 15 0	Paid weekly
Boiler makers	„	..	0 14 0	Paid weekly
Labourers	„	..	0 6 0	Paid weekly
Apprentices	Per week	..	0 12 0	Paid weekly
Tobacco factory hands—				
Men	„	1 10 0	2 8 0	
Women	„	0 16 0	1 16 0	
Boys	„	0 6 0	0 12 0	
Girls	„	0 10 0	1 0 0	
Sugar refinery—				
All unskilled labour hands	Per hour	..	0 0 7½	12 hours per day
Cotton factory hands—				
Men	Per day	0 3 6	0 4 6	Not including 1st, 2nd, and 3rd hands
Women	„	0 3 2	0 5 0	Not including 1st, 2nd, and 3rd hands
Boys	„	0 1 8	0 2 6	Not including 1st, 2nd, and 3rd hands
Girls	„	0 1 8	0 2 6	Not including 1st, 2nd, and 3rd hands
Cotton press hands	Per bale	..	0 0 5	
„ yard „	„	..	0 0 3	
Grain elevator hands—				
Shovellers	Per hour	..	0 1 3	
Trimmers	„	..	0 2 0	
Sackers	„	..	0 1 8	
Stevedores	Per day of 10 hours	..	1 5 0	
Longshoremen	Per day of 10 hours	..	1 0 0	

Health statistics.

For the reason already named, that the Report of the Board of Health is not yet published, few statistics can be given under this heading.

Of an estimated population of 254,000 (according to the Board of Health, but it is believed to be as high as 265,000) the total number of deaths was, in 1893, 7,156; an average death rate of 28·17. Taking, however, the death rate of the white population separately from the coloured, it is found as follows:

Description.	Number of Deaths.	Rate Per 1,000
		Per cent.
White	4,502	24·40
Coloured	2,654	38·19

The greater mortality amongst the very large coloured population is no doubt owing in a great measure to their inferior surrounding and lack of sanitary knowledge.

The principal causes of death were as follows:

Description.	Number of Deaths.
Phthisis pulmonalis	870
Pneumonia	436
Heart diseases	462
Bright's disease	407
Brain diseases	374
Malarial fevers	324
Senile debility	347
Cholera infantum	219
Tabes mesenterica	205
Trismus nascentum	211
Diarrhœa	172
Dysentery	111
Enteritis	175
G. enteritis	78
Cancer	167
Meningitis	125
Bronchitis	195
Influenza	115
Diphtheria	89
Typhoid	39
Paralysis	78
Traumatic tetanus	68
Asthma	39
Infantile debility	76
General debility	40
Premature birth	82
Inanition	79
Old age	35
Pregnancy	50
Accidents	134
Suicides	43
Murdered	38
Sunstroke	19

Of the total number of deaths (7,156) 510 were British subjects, principally Irish.

1,487 deaths occurred in hospitals, asylums, and other public institutions.

There were 576 still-births, which are not recorded amongst the deaths.

The highest mortality was in December, 844, and the lowest in September, 487.

Years.		Number of Deaths.
From—	To—	
1	5	2,096
5	10	187
10	15	120
15	20	202
20	30	738
30	40	793
40	50	742
50	60	704
60	70	717
70	80	516
80	90	252
90	100	23

Weather statistics.

The highest temperature was recorded on September 15, 95°, and the lowest on January 20, 29°.

The monthly average temperature is as follows:—

Month.	Degrees Fahr.
January	50·2
February	61·2
March	60·8
April	71·6
May	75·8
June	80·2
July	83·1
August	82·0
September	79·8
October	69·1
November	60·3
December	58·4
Average	69·4

The total rainfall during 1893, was 48 inches, against 63 inches in 1892.

Shipping returns.

As compared with last year, 1892, British shipping returns for 1893 show a considerable falling-off.

ENTERED.

Year.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
1892 . .	19	5,330	464	707,804	483	713,134
1893	13	1,339	348	584,997	361	586,336

CLEARED.

Year.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
1892	21	6,513	473	724,745	494	731,258
1893	13	1,339	363	598,424	376	599,763

The first, and only vessel to clear in 1893, from this Port direct for Manchester, since the canal was opened, was the s.s. "Venango," on December 27, 1893. Her cargo consisted of 4,024 bales of cotton, 86,000 bushels of corn, 175 barrels claret.

The next to clear was the s.s. "Ohio," on January 8, 1894.

RETURN of all Shipping at the Port of New Orleans during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	13	1,339	348	584,997	361	586,336
American	20	3,955	234	145,205	254	149,160
.. coastwise	26	15,982	200	398,440	226	414,422
Spanish	15	9,920	69	130,953	84	140,873
Italian	20	13,094	14	8,538	34	21,632
German	7	9,835	21	39,388	28	49,223
Austrian	3	2,157	...	...	3	2,157
French	1	1,148	15	34,470	16	35,618
Swedish	...	..	17	14,042	17	14,042
Norwegian	5	5,500	185	78,318	190	83,818
Total, excluding American, coastwise ...	...	...	...	...	987	1,082,859
Total, for the year preceding ...	...	...	...	...	1,084	1,228,290

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	13	1,339	363	598,424	376	599,763
American	10	3,464	199	118,034	209	121,498
,, coastwise	19	11,184	240	482,385	259	493,569
Spanish	14	2,585	70	132,136	84	141,721
Italian	14	9,554	15	9,081	29	18,635
German	8	11,178	23	43,428	31	54,606
Austrian	3	1,850	...	...	3	1,850
French	...	...	14	32,011	14	32,011
Swedish	...	...	17	14,042	17	14,042
Norwegian	5	5,500	186	78,885	191	84,385
Total, excluding American, coastwise ...	...	...	...	...	954	1,068,511
Total, for the year preceding ...	...	...	...	...	1,054	1,219,877

On August 11, 1868, "An Act to increase the Revenues of the State, and to authorise the incorporation and establishment of the Louisiana State Lottery Company, and to replace certain Acts now in force" became law. The duration of the life of the Louisiana State Lottery Company, was fixed at 25 years from January 1, 1869. This was the famous Louisiana State Lottery Company, that was destined to play so important a part in the political history of Louisiana, and in the legal history of the United States. Louisiana Lottery Company.

In 1869, the corporation leased its privileges to Murray, Simmons, & Co., who from that time until the expiration of the charter, were the beneficiaries of the exclusive Lottery franchise granted by the Act of incorporation.

In 1888, in view of the approaching extinction of the Corporation on December 31, 1893, several persons (stockholders of the Louisiana State Lottery Company) made a proposition to the State, by which, if the State would, by an amendment to the Constitution of Louisiana, grant them privileges similar to those possessed by the Louisiana State Lottery Company, with the exclusive right to enjoy them for 25 years, said parties would pay the State 1,250,000 dol. (250,000*l.*) per annum, to be applied to building levees, supporting public schools, and the Charity Hospitals, Asylums, &c.

The pecuniary results flowing from acceptance of this proposition would have been enormous. The receipts of the company were more than ten million dollars per annum.

The proposition met with great opposition from some people, and with equally great favour from others. After a desperate struggle in the Legislature, the resolution submitting the amendment to the popular vote was passed by exactly the requisite two-thirds, and was sent to the Governor for his approval. This was refused. Meanwhile a Senator, who had voted for the resolution, died, leaving the resolution with one

less than two-thirds wherewith to pass it over the Governor's veto.

Then, denying the power of the Governor to veto, the parties interested demanded that the Secretary of State should promulgate the amendment for submission to the people. The Secretary of State refused, and mandamus proceedings were instituted, resulting in the Supreme Court of the State holding, by a majority of one, that the resolution was properly passed, and that the Governor could not interfere.

In the meantime the Federal Government had taken hold of the matter. About 90 per cent. of the tickets of the Louisiana State Lottery Company were sold in other States contrary to their laws, and were sent through the mails; so also were the newspapers advertising the Lottery, as well as the money remitted as the price of tickets.

The Federal Statute of September 19, 1890, which prohibited the sending of lottery matter through the mails was sought to be enforced against proprietors of newspapers containing advertisements of the Lottery Company. Editors of New Orleans and Mobile newspapers were arrested—and under habeas corpus proceedings was raised the issue: that an attempt by Congress to determine that lottery matter was immoral and to exclude from the use of the national mails newspapers advertising such matter was an abridgement of the liberty of the Press, and thus unconstitutional.

The decision of the Supreme Court of the United States was adverse to the editors; and the newspapers, as well as all letters suspected of containing lottery tickets, advertisements or remittances were excluded from the mails, and their senders held liable for punishment (decided February 1, 1892).

Upon this the Lottery Company abandoned the contest and withdrew the proposition above referred to.

The Anti-Lottery State Officers were eventually elected, and a law was passed making it a criminal offence to sell lottery tickets in Louisiana.

On December 31, 1893, the Louisiana State Lottery Company ceased to exist, but it was practically revived in Spanish Honduras, from which point it is carrying on its operations.

PENSACOLA.

Mr. Vice-Consul Howe reports as follows:

Exports of pitch-pine.

Although the staple trade of Pensacola—the export of pitch-pine timber, deals and lumber, and other manufactures of wood—appeared to be depressed during the year 1893, from several causes, notably, low prices abroad, particularly in the United Kingdom, where the majority of these shipments go,

still on summing up the business of the year in compiling this report, I find that in comparison with past years a fair average is shown. Among the tables annexed will be found statements of these shipments and their comparative values. Fair yearly trade.

The export business from Pensacola in coal during the past year increased very much. The shipments were mostly to Galveston, Texas, and to ports in Mexico. Three British steamers under time-charters took a large quantity of the coal to Mexico. The export coal company of Pensacola, the operators in this large export trade, have also their own barges, and powerful steam tugs, by which system much of the coal is shipped. Coal exports increased. British steamers employed.

A risky way of transportation this, however, as has been proved on several occasions by some of the barges being lost at sea during their voyages. Some sailing vessels are also engaged in this coal-carrying trade—large American schooners principally. Altogether about 100 vessels were engaged in this trade during 1893. The coal is brought to Pensacola by railroad direct from the coal fields of Alabama. The company have extensive wharves at their disposal for the business, and are otherwise well equipped in their arrangements for large outward shipments, the loading being right from the coal cars, and other receptacles by "chutes" to the vessels alongside of the wharves. Other modes of shipping.

I believe that the railroad through which this coal is operated, is largely interested in the business of the export coal company, This railroad is the only one running into Pensacola from the coal fields hence it will be seen that with no opposition whatever in this direction, the coal business from Pensacola can be carried on in the interests entirely of the coal company and the railroad so far as export prices will allow, and the usual trade law of supply and demand will admit.

The coal exported is of a bituminous kind. The table showing last year's exports of coal hence, in quantity and value, will be found annexed.

In my last trade report I mentioned that a trade had sprung up between Pensacola and ports in Cuba, by the exportation of bread-stuffs and such articles direct from the western states to the wharves here for loading. Trade with Cuba.

This business has continued very briskly, and several British steamers were engaged in the carrying of these goods during the past year. The tables of exports annexed will show the value of those articles to the Cuban ports during the year. British steamers employed.

The usual limited imports which yearly come here from abroad were received during the past year. Fertilizers from the Continent and United Kingdom—salt from the latter; and some iron ore from ports in Spain, and cargoes of fruit from the West India Islands. The iron ore goes forward to foundries in Alabama for smelting purposes. The salt also Imports.

goes forward to larger import markets than this. All by railroad and discharged from the vessels at the wharves here.

Chief articles.

The chief articles of required daily supplies come to Pensacola by railroad from the large northern and western markets of the United States, and the value of these chief imports amounts to several millions of dollars yearly.

British tonnage.

It will be observed by the tables of shipping at Pensacola during the past year, that British tonnage, among foreign flags, came second, the Swedish and Norwegian vessels being more numerous, as they have been for a few years; but a large number of Swedish and Nowegian sailing vessels now plying here were, a few years ago, coming to this port under the British flag.

Treaty between Great Britain and United States for arrest of seamen deserters.

Referring to the treaty between the governments of Great Britain and the United States which came into operation a little over a year ago, whereby the arrest of merchant seamen deserters may be affected, and the men returned to their vessels, I have to state that very little good has come of it at this port. I have had about a dozen applications from masters during that time to assist them in having their deserters arrested; and the result has been that about ten or a dozen seamen have been so arrested and returned.

Treaty not working well.

There are several things to be looked at, however, when viewing this question. In the first place, the charge laid down for the arrest and return to his vessel of each seaman by the United States authorities is 20 dol. Then again, as the master argues, the seaman will desert a second time, and no good will have been done.

It is true that deserting seamen would be kept imprisoned until the sailing of their ships, by the United States authorities, at the request of the Consular officer, upon payment by the master of this additional expense; but this course appears impracticable, or not proper, therefore, the treaty so far is almost a dead letter at Pensacola, when compared with what was expected of it, for the benefit of the seamen as well as for the shipowner, and upon moral principles generally.

Act appointing shipping agents.

During the year a Bill was passed by the Legislature of Florida, entitled "an Act to protect seamen from imposition, and to provide for the appointment of shipping agents."

In the Act the following sections appear:—"That the duties of a shipping agent so appointed shall be to afford facilities to vessels not so provided under the laws of the United States. To superintend the employment of seamen to serve on ocean-going vessels where such superintendence is not provided for by the said laws of the United States, and in so doing to especially consider, represent, and protect the seamen so employed or engaged to be employed against the imposition or fraud of others, or his own improvidence in the fixing of the terms of employment. To aid the masters of vessels, or Consuls of foreign nations in securing the presence on board, at the proper time, of men who are so engaged or

employed, where other provision therefore has not been made by Congress.

"That any person other than such shipping agent or one authorised by an Act of Congress who shall perform, offer to perform, or attempt to perform, any duty or act belonging to the shipping agent at any port where one shall have been appointed, shall be fined not more than 500 dol., or imprisoned in the county jail not more than one year.

"That the said shipping agent shall be entitled to demand and receive from every vessel or her owner or master for each seaman engaged as aforesaid, the sum of 3 dol., which shall be paid to the shipping agent upon his receipted voucher, which shall thereupon become a charge in favour of the owners or master of the vessel against the seaman so employed, as aforesaid."

Not a good measure as at present operated.

The Act would prove to be a good measure if the powers given to the shipping agent were enforced. The shipping agent could, as I take it by the terms of the Act, protect the seaman from imposition by over-charges of the boarding-house keeper, and thereby reduce the advance wages demanded for the seaman. He could also, I think, fix the rate and advance of wages to seamen according to the demand and supply of such engagements. But this is not done; the boarding-house keepers have a hard and fast amount for wages and advance wages. Their rates for some time past have been:—To the United Kingdom and Continent, 4*l.* wages, and 5*l.* advance. To South American ports 18 to 20 dol. wages, and 25 to 30 dol. advance.

It does not matter how long the seaman has been in the boarding-house, whether two days or seven, the standing amount fixed as advance wages is always entered in the agreement against the seaman, and collected by the boarding-house keeper. It does not suit the boarding-house keeper to alter this item, and here it is that the shipping-agent could regulate the matter, and protect the seaman.

Again, the sailor boarding-house keeper keeps to the demand of a shipping fee of from 3 to 5 dol. (never less than 3) for each seaman taken from his house by a master. The shipping agent also takes 3 dol. from the master, thus 3 dol. are added to the master's disbursements for every seaman now engaged according to the Act.

It is true that the master is not under the control of the shipping agent; he might get his men, as before the passing of the Act, if he could, by simply paying the demand by the boarding-house keeper as shipping fee. But the shipping agent threatens the boarding-house keeper that unless the men are engaged through him he will prosecute the latter, and the master is told by the boarding-house keeper that the men must be engaged through the shipping agent or he cannot have them, and the master must meet both fees, or not be able to secure his men.

I certainly think that the shipping agent could by the provisions of the Act, save the master from the crimp's demand for a shipping fee—an additional shipping fee—by prosecution of the crimp for interfering in his, the shipping agent's duties. The supplying of men from a sailor boarding-house on payment of the actual money due by them for board, is all that the keeper of the house should be allowed to demand.

It will be seen then that the master is not helped by the Act, nor is the seaman protected as I take the Act to mean. The fee of 3 dol. to the shipping agent cannot, in my opinion, be deducted from the seaman's wages, and the levying of such a fee on foreign seamen by the Act referred to, never would stand, I think, if legally tested.

General remarks.

The employment of the working classes at Pensacola appears to be always quite sufficient. Skilled labour commands good wages at regular rates as laid down by their societies. Stevedores and labourers, who work on the shipping are, more or less, supplied with work during the entire year, and their wages also fixed by their Societies, are very remunerative.

The city of Pensacola has been healthy and free from epidemics for some years past, and as a whole there is contentment and prosperity among the inhabitants.

Now follow the tables referred to in, and connected with, this report:—

RETURN of Principal Articles of Export from Pensacola during the Years 1893–92.

Articles.		1893.				1892.			
		Quantity.	Value.			Quantity.	Value.		
			£	s.	d.		£	s.	d.
Pitch-pine lumber...	Super. feet	142,256,000	355,640	0	0	135,439,000	338,597	10	0
Sawn pitch-pine timber	Cubic feet	10,208,460	256,211	10	0	15,544,432	388,612	1	0
Hewn pitch-pine timber	,,	384,251	8,806	15	6	421,616	9,893	10	3
Cedar	,,	2,212	161	5	10	1,550	115	2	6
Cotton	Bales ...	500	5,208	6	8	7,619	71,428	2	6
Coal	Tons ...	53,292	56,395	12	6	41,611	26,006	17	6
Flour...	Sacks ...	91,392	76,160	0	0	6,696	4,887	3	4
Corn	Bushels ...	491 000	51,145	16	8	19,616	979	0	0
Bran	,, ...	29,230	3,277	10	0	12,000	500	0	0
Oats	,, ...	50,375	4,947	6	8	...	...		
Hay	Bales ...	8,945	1,863	10	10	...	...		
Resin	Barrels ...	2,989	1,868	2	6	1,534	767	0	0
Shooks	Bundles ...	5,600	4,583	6	8	...	...		
Wire Fencing	Reels ...	5,760	3,600	0	0	..	..		
Pig-iron	Tons ...	60	125	0	0	..	..		
Bar-iron	,, ...	125	875	0	0	...	...		
Iron piping... ...	,, ...	125	1,041	13	4	..	..		
Coffins	Boxes ...	140	1,460	16	8	..	..		
Agricultural implements	,, ...	300	1,562	10	0	..	..		
Beer	Kegs ...	1,050	875	0	0	..	..		
Iron safes	...	14	291	13	4	...	...		
Other articles	...	...	1,200	0	0	...	1,90	190	0
Total	...	...	836,280	16	8	...	843,789	6	1

NOTE.—The following as regards the above table of exports is descriptive of the quantities, values, weights and measures, the conversion of money into sterling, being at the rate of 4 dol. 80 c. per 1*l.*; lumber at average of 12 dol. (2*l.* 10*s.*) per 1,000 superficial feet, board measure; sawn timber at an average of 12 c. (6*d.*) per cubic foot, basis 40 feet average; hewn timber at average of 11 c. (5½*d.*) per cubic foot, basis 100 feet average; cotton at average of 10 c. (5*d.*) per lb., in bales of 500 lbs. average weight each bale; coal at 3 dol. 25 c. (13*s.* 6½*d.*) per ton; cedar at 35 c. (1*s.* 5½*d.*) per cubic foot; flour at 4 dol. (16*s.* 8*d.*) per sack of 200 lbs.; corn at 50 c. (2*s.* 1*d.*) per bushel; oats at 40 c. (1*s.* 8*d.*) per bushel; bran at 40 c. (1*s.* 8*d.*) per bushel; hay at 1 dol. (4*s.* 2*d.*) per bale of 100 lbs.; resin at 3 dol. (12*s.* 6*d.*) per barrel; shooks at 4 dol. (16*s.* 8*d.*) per bundle; wire fencing at 3 dol. (12*s.* 6*d.*) per reel; pig-iron at 10 dol. (2*l.* 1*s.* 8*d.*) per ton; bar-iron at 33 dol. 60 c. (7*l.*) per ton; iron piping, 40 dol. (8*l.* 6*s.* 8*d.*) per ton; coffins at 50 dol. (10*l.* 8*s.* 4*d.*) each nest; agricultural implements at 25 dol. (5*l.* 4*s.* 2*d.*) per box; beer at 4 dol. (16*s.* 8*d.*) per keg; iron safes at 100 dol. (20*l.* 16*s.* 8*d.*) each.

RETURN of Principal Articles of Import to Pensacola during the Years 1893–92.

Articles.	Value.	
	1893.	1892.
	£	£
Chief articles	..	..
Other „	19,912	4,346

NOTE.—As stated elsewhere in this report, the value of chief articles brought to Pensacola yearly amounts to several millions of dollars.

TABLE showing the Total Value of all Articles Exported from and Imported to Pensacola from and to Foreign Countries during the Years 1893–92.

Countries.	Exports.						Imports.	
	1893.			1892.			1893.	1892.
	£	s.	d.	£	s.	d.	£	£
United Kingdom ..	205,376	6	0	439,934	9	2	4,676	1,314
South Africa	6,977	5	0	..			..	..
Spain and Colonies ..	184,137	5	0	45,946	16	7	10,989	1,283
France	53,969	3	8	41,305	11	1	..	..
Italy	53,687	2	0	38,289	6	4	..	111
Netherlands	47,177	0	0	57,381	18	8	..	..
Argentine Republic ..	46,295	5	0	44,810	16	0	..	..
Brazil	36,685	1	0	32,471	10	0	..	..
Belgium . ..	33,979	2	6	21,806	10	10	..	..
Mexico	29,890	0	0	12,669	10	0	..	..
Germany	24,633	0	0	28,324	1	1	4,247	1,638
Egypt (Alexandria) ..	9,049	1	6	..			..	..
Austria	7,867	2	6	2,646	18	3	..	..
Uruguay	7,542	2	6	3,460	0	0	..	..
Central America ..	3,283	0	0	7,468	10	0	..	..
Portugal	1,962	0	0	5,271	3	1	..	..
Norway	1,769	0	0	..			..	.
Tunis	..			616	5	0	..	..
Total to foreign countries	754,278	16	8	782,403	6	1	..	.
Total to ports in the United States ..	82,011	0	0	61,386	0	0	..	..
Total	836,289	16	8	843,789	6	1	19,912	43,460

TABLE showing Assortment and Destination of Exports from Pensacola during the Year 1893.

Country.	Sawn Timber.	Hewn Timber.	Lumber.	Cedar.	Cotton.	Coal.	General Cargo.	Value.		
	Cub. Feet.	Cub. Feet.	Super. Feet.	Cub. Feet.	Bales.	Tons.	Tons.	£	*s.*	*d.*
United Kingdom	6,879,000	171,884	11,802,000	664	..	..	..	205,376	6	0
South Africa	243,000	6,214	248,000	461	..	..	..	6,977	5	0
Cuba	..	..	9,122,000	..	..	1,024	20,637	178,372	0	0
France	588,650	123,658	12,485,000	..	500	..	..	53,969	3	8
Italy	987,250	24,890	11,374,000	1,087	..	..	..	53,687	2	0
Netherlands	920,250	13,248	9,547,000	..	..	..	..	47,177	0	0
Argentine Republic	31,830	..	18,200,000	..	..	..	..	46,295	5	0
Brazil	..	..	14,674,000	..	..	..	..	36,685	1	0
Belgium	29,150	3,607	13,235,000	..	..	..	..	33,979	2	6
Mexico	..	..	650,000	..	..	41,745	..	29,890	0	0
Germany	152,900	7,057	8,260,000	..	..	..	..	24,633	0	0
Egypt (Alexandria)	6,500	4,974	3,510,000	..	..	..	..	9,049	1	6
Austria	193,000	3,020	1,189,000	..	..	..	..	7,867	2	6
Uruguay	..	..	3,017,000	..	..	..	..	7,542	2	6
Spain	94,830	832	1,350,000	..	..	..	..	5,765	5	0
Central America	..	..	962,000	..	..	1,297	..	3,283	0	0
Portugal	66,750	8,996	36,000	..	..	..	..	1,962	0	0
Norway	15,350	15,871	409,000	..	..	..	..	1,769	0	0
United States	..	..	22,186,000	..	..	39,206	..	82,011	0	0
Total	10,208,460	384,251	142,256,000	2,212	500	83,272	20,637	836,289	16	8

Return of all Shipping at the Port of Pensacola during the Year 1893.

Entered

Nationality.	Sailing.		Steam.		Total	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	51	42,153	49	61,340	100	103,493
American	156	88,082	...	...	156	88,082
Swedish and Norwegian	163	145,541	15	12,089	178	157,630
Italian	63	45,884	...	...	63	45,884
Spanish	3	2,277	13	21,826	16	24,103
Russian	27	19,527	...	...	27	19,527
Austrian	11	7,983	...	...	11	7,983
German	5	3,385	...	...	5	3,385
Argentine Republic	2	1,540	...	...	2	1,540
Portuguese	2	1,375	...	...	2	1,375
French	2	1,226	...	...	2	1,226
Other countries (3)	3	2,583	...	...	3	2,583
Total	488	361,556	77	95,255	565	456,811
,, for the year preceding ...	519	369,985	70	102,624	589	472,609

Cleared.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	52	41,270	48	60,110	100	101,380
American	156	87,431	...	...	156	87,431
Swedish and Norwegian	156	135,603	15	12,089	171	147,692
Italian	56	40,438	...	...	56	40,438
Spanish	4	3,472	13	21,826	17	25,298
Russian	27	19,843	...	...	27	19,843
Austrian	11	8,338	...	...	11	8,338
German	7	5,329	...	...	7	5,329
Argentine Republic	2	1,540	...	...	2	1,540
French	2	1,226	...	...	2	1,226
Other countries (3)	3	1,998	...	...	3	1,998
Total	476	346,288	76	94,025	552	440,313
,, for the year preceding ...	525	370,808	69	101,848	594	472,656

Mobile-Alabama.

Mr. Vice-Consul Barnewall reports as follows :—

The commercial year commences on September 1, 1892, and ends on August 31, 1893.

Cotton receipts and prices.

Cotton receipts were 182,884 bales valued at 7,620,776 dol. 22 c., against 287,971 bales valued at 10,607,852 dol. of the year previous, average price per 1 lb. 8·30 c. against 7·40 c. the previous.

Exports.

There has been a decrease in the direct exports to Liverpool of 1,780 bales.

Lumber

The business done in lumber this past season compared to all other corresponding periods, shows a very gratifying in-

crease in the total number of superficial feet handled. Mobile as a lumber market is marching steadily to the front, the past season's record showing the largest business in her history. The following figures for 1892–93 and 1891–92, are given for comparison. The shipments by small coasting vessels, shipments by railroads and rivers and local consumption, are estimated, based upon last season's statement.

TABLE showing the Total Shipments for the Year 1893–92. Shipments.

Description.	Quantity.	
	Super. feet.	Super. feet.
1893.		
Lumber, total foreign coastwise	79,304,565	
„ railroad shipments	8,000,000	
„ towed to the islands	60,000	
Timber direct in vessels—		
Hewn	30,082,044	
Sawn	34,442,064	
Amount towed to Horn and Ship Islands—		
Hewn	1,108,029	
Sawn	2,170,267	
Lumber, local consumption and rivers	7,500,000	
		162,666,969
1892.		
Lumber, coastwise in vessels	22,780,789	
„ foreign in vessels	33,318,106	
„ railroad shipments	8,200,000	
„ towed to the islands	38,000	
Timber direct in vessels—		
Hewn	33,645,960	
Sawn	27,219,096	
Amount towed from Mobile to Horn and Ship Islands—		
Sawn	2,900,694	
Hewn	1,190,784	
Lumber, local consumption—		
Steamboat shipments, &c.	7,500,000	
		141,793,429
Increase	..	20,873,540

The growth of the lumber business of this port will no doubt increase with each recurring season, Mobile being now well known as a leading lumber market. The vast forests of pine hereabouts will continue to bring increased wealth to this port.

In the fall of 1892, the timber trade was dull, shippers Timber.
however, contracted for considerable hewn timber on a basis of 13 c. 100 feet average. This price was rather higher than European markets would permit, as they were largely overstocked, as spring approached prices fell to 12 c.; shortly

afterwards the market became nominal, owing to further accumulation of stocks in foreign ports, and local holders found it almost impossible to make sales, except at figures below the price of production. The increase on the past season in cubic feet of hewn and sawn timber is 304,921.

Hard woods.

The shipments of the past season of oak, poplar, cedar and other hard woods are largely in excess of all previous records, and with the rapidly increasing importance of Mobile as a lumber market, these woods, which are in abundance in the surrounding forests, will receive more attention.

Shipments.

The following statement shows the shipments for the past two seasons :—

Year.	Articles.	Quantity.	
		Cubic feet.	Cubic feet.
1892-93	Oak, hewn..	354,423	
	Assorted	966,233	
			1,320,656
1891-92	Oak, hewn..	193,480	
	Assorted	88,971	
			282,451
	Increase	..	1,038,205

Staves shipments.

The foreign shipments were as follows :—

Year.	Quantity.	Value.
		Dollars.
1892-93	190,000	25,000
1891-92	147,000	22,000

in addition there were shipped by rail and water to N.Y., 735,000 staves.

Naval stores.

There has been a very considerable falling off in the receipts of turpentine and resin as the following will show :—

Articles.	Quantity.		
	1892-93.	1891-92.	Decrease in 1892-93.
	Barrels.	Barrels.	Barrels.
Resin	69,120	87,926	18,806
Turpentine	18,100	22,172	4,072

Vegetables.

The history of Mobile truck farming shows with each occurring season an increase of ground tilled, and an increase in production. The past season eclipsed any previous yield.

The potato crop was good, a heavy yield resulted, and prices obtained were fair, giving a fair profit to the gardeners.

Peas and beans were marketed in abundance, and with profit. Increase over last season.

Articles.		Quantity.
Cabbage	Crates ..	26,412
Potatoes	Barrels ..	14,892
Beans	Boxes ..	17,333
Peas..	„ ..	106

Fruit imports.

The past season's business in handling and importing fruits was largely in excess of any previous corresponding period. The Mobile Fruit and Transportation Company, the largest importers, having two steamers in commission plying between this port and Bluefields, Nicaragua. Since October 6, 1892, to August 31, 1893, twenty-eight cargoes have been landed here. They have landed 300,000 bunches of bananas, average value 225,000 dol. There are light draft schooners sailing to and from the fruit islands making regular trips to this port during the season. The following are the estimated receipts:—

Articles.		Quantity.
Bananas	Bunches ..	535,000
Cocoanuts	..	2,514,000
Pineapples	..	1,506,000
Oranges	Boxes ..	68,300
„	Loose ..	125,000
Lemons	Boxes ..	3,000
Garlic	Strings ..	5,000

the increase over the season of 1891–1892 was as follows:—bananas, 271,245 bunches; cocoanuts, 890,000; oranges in boxes, 9,000, loose, 11,000; pine apples, 1,500,000; lemons, 1,780 boxes.

Most of this fruit on arrival is loaded into cars of the Mobile and Ohio Railroad, and, on a fast freight schedule, is distributed through the Western Cities, Chicago, St. Louis, &c.

Mobile Bay, Harbour and River.

Harbour improvements.

Report of Major Damrell, U.S.A. Engineer. From the mouth of Chickasabogue Creek to a point in the lower bay, where the natural depth is 23 feet—a distance of 33·09 miles—an average central depth has been obtained of 23·89 feet. With the exception of about 6 miles in the upper part, the width of the channel is 80 feet, and over Dog River Bar it is 200 feet, while at the extreme lower end it is 120 feet.

The amount expended during the past fiscal year, June 30,

1892, to June 30, 1893, was 17,831,933 dol., and the quantity of material removed 2,433,180 cubic yards. The operation of dredging is progressing uninterruptedly, and it is believed that the channel is in better condition than ever before.

Shipping: up and down channel.

List of vessels that have arrived and departed from this port, beginning September 1, 1892, and ending August 31, 1893. These vessels being large sea-going vessels of their respective rigs, and showing the maximum draft of water as drawn by them going up and down the channel.

Description.	Drawing up to and Including.				Number.	
	Up.		Down.		Up.	Down.
	Ft.	in.	Ft.	in.		
Steamships	16	0	19	0	120	121
Ships and barks ..	18	0	20	4	147	155
Brigs	15	6	18	0	15	20
Schooners, which include four, three, and two masters	18	0	19	0	199	201
	..		..		481	497
Total, 1893 ..	..		..		981	
	..		..		396	396
„ for the year preceding	..		..		792	
Increase, year ending August 31, 1893	..		..		189	

The above statement made up from the report of the Harbour Master.

NOTE.—The following tables given heretofore have been discontinued in the Annual Report on September 1 of the trade and commerce of Mobile, consequently I have to omit them in this report.

Annex B, Return of Principal Articles of Import to Mobile during the years 1892–93, 1891–92. Annex C, Table showing the total value of all articles exported from Mobile, and imported to Mobile from and to foreign countries during the years 1892–93, 1891–92.

Return of Principal Articles of Export from Mobile, during the years 1892–93, 1891–92.

Annex A.—RETURN of all Shipping at the Port of Mobile during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	93	34,783	17	18,750	110	53,533
Norwegian	58	50,802	66	26,780	124	77,582
Russian	11	6,156	1	649	12	6,805
Swedish	4	2,625	...	...	4	2,625
Italian	8	4,572	...	...	8	4,572
German	3	2,640	...	...	3	2,640
Danish	2	1,147	...	...	2	1,147
French	1	663	...	...	1	663
Mexican	1	88	...	...	1	88
Spanish	2	1,987	...	...	2	1,987
Dutch	1	296	...	...	1	296
Hondurian	1	72	...	...	1	72
American	92	37,256	...	...	92	37,256
Total	277	143,087	84	46,179	361	189,266
Coastwise	...	...	...	...	110	72,337
Grand total	...	...	...	...	471	261,603
Total for the year preceding	...	...	...	...	431	282,905

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	95	37,051	18	20,702	113	57,753
Norwegian	59	51,714	68	27,607	127	79,321
Russian	13	7,890	1	649	14	8,539
Italian	11	7,547	...	...	11	7,547
German	3	2,595	...	...	3	2,595
Danish	2	1,146	...	...	2	1,146
French	1	663	...	...	1	663
Mexican	2	362	...	...	2	362
Spanish	2	1,987	...	...	2	1,987
Dutch	1	296	...	...	1	296
Hondurian	1	72	...	...	1	72
Portuguese	1	601	...	...	1	601
American	91	34,864	...	...	91	34,864
Total	282	146,788	87	48,958	369	195,746
Coastwise	...	...	...	...	144	90,809
Grand total	...	...	...	...	513	286,555
Total for the year preceding	...	...	...	...	430	267,942

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UNITED STATES.

REPORT FOR THE YEAR 1893

ON THE

AGRICULTURAL CONDITION OF THE CONSULAR DISTRICT OF BOSTON AND FARMING IN NEW ENGLAND STATES.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 398.

Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1894.

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UNITED STATES.

BOSTON.

Consul Yeats-Brown to the Earl of Kimberley.

My Lord, *Boston, April* 25, 1894.

I HAVE the honour to enclose my Annual Agricultural Report, and also a separate Report on the Condition of the Farming Interest in these New England States, which I submit with diffidence, and a full knowledge of its insufficiency, but which I felt bound to attempt with a view to attracting attention to the educational advantages possessed by farmers in this country.

I have, &c.

(Signed) M. YEATS-BROWN.

Report on Agriculture in the Consular District of Boston, together with a Report on Farming in the New England States.

ABSTRACT of Contents.

	PAGE
Condition of farmers in New England	2
Price of land	2
Educational advantages	3
"Grange" meetings and institutes	3
Secretary of Agriculture	4
State Colleges	4
Agricultural College and Experiment Station	5
Meteorological and Entomological Departments	6
Incorporated societies: "Granges"	7
Farmers' Congress and clubs	8
Report on Agriculture for 1893 (Mass.)	9
Abandoned farms	11

An agricultural report on the New England States could not fail to be interesting reading if undertaken by a competent hand, but I feel so keenly my incompetence that I should not venture to approach the subject otherwise than in the form of the ordinary annual report were it not that, in view of the agricultural depression at home, it seems the absolute duty of everyone, so far as in him lies, to assist in finding and pointing out any available remedies.

Condition of farmers in New England.

I have not been long enough in the country to speak with any personal knowledge of individual farmers here, but that they are, on the whole, prosperous, and that they are hopeful of their future I think there is no manner of doubt.

There are grumblers everywhere, and the farmers here make no exception to the rule; but there is ample evidence in the State reports on agriculture, in the lectures delivered at agricultural meetings, and in the articles and correspondence in the Press, that the New England farmer is doing far more than "make the two ends meet," and, what is notably interesting to us, that his prosperity is recent and also progressive.

Now if this is the case, the subject is surely well worth the earnest study of competent men. I repeat that I am quite unfitted to deal adequately with the matter, but my hope is that by attracting attention to it it may be taken up by those who do understand the subject, and if, being on the spot, my services can be made available for collecting further information, or answering specific questions, I shall be truly happy if they are made use of.

I am impressed with the belief that we know singularly little of America and American ways, and that in some respects, at least, we might greatly profit by a closer study of the progress made by our keen-witted, go-ahead descendants. In this matter of farming, anyhow, it is clear that our Old World experience is of no use in the new state of affairs brought about by free trade, rapid communications, and cheap freights. Now the New England farmers did feel the competition of the vast West supplying wheat and beef and pork on the one hand and fruit on the other at alarmingly low prices, and were also robbed of the flower of their youth and strength by emigration to those new lands. They felt all this just as we still do, and 20 years ago the position looked to them quite as critical as it does now to us. Yet at the present moment all this is changed, and the farmers of this district, though not rolling in wealth, are comfortably off, and certainly do not look forward to the future with apprehension.

Now how has this satisfactory state of things been brought about?

I must here observe that climate, soil, and "externals" generally are similar to ours, but in all respects somewhat less favourable to them than to us; and the race is the same, hardened somewhat, and very much sharpened and made keener and more enterprising by greater independence and freedom of thought and action, but blood of our blood and bone of our bone originally.

Price of land.

Of course, there is one great difference in the price of land be it bought or hired. Here farmers are freeholders, and th-

price they paid for the land very low. With us they are tenants, and it may be that the rent they undertake to pay is such that no improved methods will enable them to pay it and yet prosper. I feel my ignorance, but suppose that if so there is no alternative but that rents should be lowered, and must beg that question, as otherwise it is useless further to discuss the problem, at least, from the farmer's point of view. But it is often said that if the English farmer did not pay any rent at all he still could hardly make the two ends meet, whereas the outcome of the last 15 years of farming in this district clearly shows that it is possible, in a climate resembling England, to farm at a profit, and at a profit large enough not only to support the farmer in comfort, but to enable him to lay by money. This has been done, too, without any grinding economy such as is practised in France and some parts of Italy; for while the New England farmer is economical and utterly "unpretentious" in manners, life, and dress, he by no means denies himself the decencies and conveniences of life.

It remains to be seen why Old England cannot do as well as New England.

Is it superior education that has taught the New Englander to manage his farm better, and to turn from the lost industry of wheat-growing to dairy farming, poultry keeping, fruit cultivation, and "petite culture" generally? Advantages of education.

My impression is that education has, at any rate, had a good deal to do with it—not merely the learning acquired at school, nor even the practical knowledge acquired on the farm, but the educational advantages afforded by the so-called "grange" meetings and by the farmers' "institutes" (which give admirable opportunities for both theoretical and practical exemplification of all subjects connected with agriculture), and by the many other special facilities provided for agriculturists in this country, which have, so far as I know, no counterpart at home. "Grange" meetings and farmers institutes.

I may mention that Consuls have quite lately been called upon to answer a set of questions* for the Royal Commission on Agricultural Depression, and in obtaining answers from the various States in this district I took occasion to forward a number of publications from the different State bureaux. Among these there were summaries of the meetings of these farmers' institutes which seemed to me of much interest, not only for the matter brought before them and discussed, but for the example of what may be accomplished in the way of study and diffusion of knowledge through such institutions. There is no doubt that they have been the means of vastly improving many branches of agriculture in these States, notably in dairy farming, cultivation of fruit trees, and stock and horse breeding. They lead to the friendly intercourse of men occupied in the same pursuits, and the interchange of their opinions and experiences, with the great advantage of vivâ voce communication and discussion, which is of so much more practical use than written treatises.

I speak with little knowledge, but, as far as I know, we do

* See Parliamentary Paper No. 3, Commercial, 1894 (C. 7356).—Ed.

hardly anything in this direction at home, such meetings being only held at rare intervals and in a few great towns, whereas here they are held constantly, and are not centralised, but diffused in the small villages and towns.

Upwards of 130 of these institutes are held in Massachusetts in each year. In Maine and Vermont only about 20 are held, but the area of these States is far greater, as compared to population, than in Massachusetts, and it is difficult for farmers to leave their work long enough to attend meetings, even though so full of interest to them as are these institutes. In New Hampshire even fewer institutes are held, but their place is taken by very frequent "grange" meetings. There are now upwards of 200 granges in New Hampshire, with 12,000 members; whereas in 1883 there were only 64 granges, with 3,443 members.

I quite conceive that there are various reasons why such meetings should not, at first, have as much success in England as here where class distinctions are unknown, and where men are much more ready than with us to talk over their affairs, and discuss every, and any, subject in public. But after all in the early days, even here, they were not nearly as successful as they are now that their great usefulness is generally appreciated; and if it is conceded that this country is on the right track it is surely wise to profit by its experience; and if so the sooner we begin the sooner we shall conquer the initial difficulties, and get into the swing of the work.

These "institutes" are only the last link in the chain of educational instruction provided for the farmer, or rather created by him for his enlightenment in these times of competitive struggle, for it must be observed that it is distinctly the farmer in this country who has equipped himself for the fight, not anyone else who has taken the matter in hand and thought it out for him. It was the farmer who created the "Grange"; which in its turn created the State Bureau of Agriculture, and finally, through them, established the central office of the Secretary of Agriculture at Washington.

Functions of the Central Secretary of Agriculture.

This last central office has a few very important functions, such as the control of the Weather Bureau, the allotment of the federal contributions to the College of Agriculture in each State, and of such sums as may be voted in emergencies for stamping out of animal or vegetable disease, the distribution of seeds for experimental purposes, the inspection of cattle and meat for export, and some others; but, on the whole, the tendency is rather to keep control in the hands of each State, and not, at any rate, to look to the central office for help or guidance. The same spirit of decentralisation avoids also any considerable dependence on the "State" Board of Agriculture, which, while having certain most valuable functions of its own, does not seek to interfere with the details of work done by the various incorporated societies and granges.

Endowment of State Colleges.

I may here mention as a matter of mere curiosity, for it certainly could not be of practical use to us in England, the

means by which the State Colleges were originally endowed by the National Government. This was by an Act of Congress in date of July 2, 1862, entitled "An Act Donating Public Lands to the several States and Territories, which may provide Colleges for the Benefit of Agriculture and the Mechanic Arts." This Act granted to each State for such purposes, not money, but an amount of public land equal to 30,000 acres for each senator and representative in Congress, to which the State was entitled. So a little State like Rhode Island, with two senators and two representatives got 120,000 acres of land, while a big State like New York, with two senators and 34 representatives, got the enormous slice of 1,080,000 acres of "wild" land. The land was taken out in the west or wherever uncultivated land, still the property of the nation, could be found at the choice of the recipient States; and each State then sold their allotment and made the best bargain they could without further interference of the Central Government, but bound by law safely to invest the money and to use it strictly for the purposes specified in the Act. The total sum so realised by the various States of the Union, for their agricultural colleges, amounts in the aggregate to 8,000,000 dol. (1,600,000*l.*).

It would make this report uselessly long if I were to enter into particulars concerning the several States comprised in this consular district; I will therefore take Massachusetts alone as an example, and enumerate the educational advantages with which the farmers have by degrees endowed themselves.

The Agricultural College and Experiment Station.

The Agricultural College, the State Experiment Station, and the "Hatch" Experiment Station are grouped together in the outskirts of the small town of Amherst. The college opened its doors in 1867, and has at present about 140 students. Organised at the outset under the Act of Congress of 1862, it has always received a large measure of support from the Federal Government. The State (Massachusetts), also, has given liberally for buildings (for which purpose the money from the Federal Government cannot be used) as well as for other purposes, and at the present time the annual income comes in nearly equal amounts from the State and from the Federal Government. Tuition is practically free, as very little income is derived from students, indeed there is a special fund of 5,000 dol. (1,000*l.*) a year from which students who could not otherwise afford to complete their courses are helped.

By a recent Act of Congress (approved August 30, 1890) the State colleges receive an annual grant from the federal fund of 3,000*l.*, increasing annually by 200*l.* for 10 years, when it will remain at 5,000*l.* An additional annual bounty of 3,000*l.* from federal funds has also been assigned by a recent Act of Congress to each "experiment station."

State Experiment Station.

The State Experiment Station is managed under an entirely separate and independent organisation, and is supported by the State. It has separate grounds, leased for a nominal sum from the college, and has its own buildings. It has its own working library, though the members of its staff make constant use of the college library; the advantages to both of this close union of college and station are several. As to the station it would have been impossible for it to have accomplished much for several years if it had been necessary to procure and put into working order an independent plant. The college, on the other hand, gains much in return for what it gives. The intimate relations between the college and station make it possible to bring the students into closer touch and fuller sympathy with the experimental work which is being carried on. The professors, too, in their efforts to discover the problems which vex the farmers, and to help them solve these problems, are kept in closer sympathy with the farming community. They gain a truer insight into its needs and are consequently better instructors.

Hatch Experiment Station.

The "Hatch" Experiment Station was organised in 1888. It is organically connected with the college, and is supported by an annual grant of money from the United States Government. It makes use of the grounds of the college estate in so far as land for experimental purposes is concerned, and although it has a few inexpensive buildings devoted exclusively to its work, it makes continuous use of college buildings for some of its purposes. It has no separate library, and it does not maintain a separate establishment for chemical work; an arrangement with the State Experiment Station, whereby the latter receives a share of its income in consideration of doing its chemical work, has been in force from the first. Except in these respects and the joint employment of a vegetable pathologist, the work of the two stations is independently carried on. It is the intention to make the work of each cover different ground. The work of the "Hatch" Station covers a wide ground, and its results are published in the form of bulletins, of which, up to the present, 22 have been issued, besides the monthly bulletins of the Meteorological Department.

The attempt is made to make the investigations specially useful to the farmers and gardeners of the State, and in addition to reports of experiments, bulletins are issued giving information on matters of general interest to farmers, such as those upon the gypsy moth, tuberculosis, and the profitable use of commercial fertilisers.

That these bulletins are much appreciated is shown by the fact that the earlier additions used to be of 6,500 copies, whereas now it is found necessary to print 11,000.

Meteorological Department.

The Meteorological Department is one of the best equipped stations in America. It contains a complete set of Draper's self-recording instruments, and Thompson's electrograph, and a very complete record of all variations in climatic conditions is secured, and the chief results are published monthly.

Entomological Department.

The Entomological Department is also interesting and pro-

gressive. In the Horticultural Department a large share of attention is devoted to testing the new varieties of fruits, and to the study of methods of preserving from insect attack both fruit trees and vegetables. Special attention has also been devoted to tests with fertilisers in various parts of the State. Altogether 38 such experiments have been carried out, each occupying an acre of ground. The Hatch Station also exercises more or less oversight over a large number of outside experiments made by private persons. Horticultural Department. Fertilisers.

The Weather Bureau would call for special mention were it not so well known that the United States are far ahead of Europe in this respect. I would, however, point out that it appears to be especially ahead of us with regard to making the information acquired available for agriculture. Unless I am mistaken, in England the warnings and forecasts are almost exclusively sent to maritime stations, whereas here the inland stations are numerous, and, independently of the news circulated in print, warnings are conveyed from all stations by flag signals, so that the farmer in the interior of the country is as fully kept aware of any impending changes as the seafaring class is with us. Weather Bureau.

Incorporated Societies.

The incorporated societies are the earliest, and, perhaps, still the most important evidences of the spirit of self-help among the farmers here. Some of them date almost from the Declaration of Independence—the Massachusetts Agricultural Society having been incorporated in 1792, the "Middlesex" in 1803, the "Berkshire" in 1811, and the "Hampshire" in 1814. They now number 36, have a collective membership of 30,752 associates, and own invested property to an aggregate value of 170,000*l.* They have an annual income of some 44,000*l.* (including 4,200*l.* bounty from the State), out of which they pay away about 40,500*l.* for various purposes, about 9,600 persons in each year being recipients of either premiums or gratuities, which amount in the aggregate to 13,000*l.* Each incorporated society receives a bounty of 600 dol. (120*l.*) a year, and thereby undertakes to hold at least three "institutes" during the year. The number of institutes held in 1892 was 132, and in 1893, 135. They also each of them hold a local fair every year.

Granges.

The report of the State Grange for 1893 shows that at the present time there are 120 granges in Massachusetts, with an aggregate membership of 10,719, and congratulates the "Order upon the fact that there has been no falling-off in a year which proved so disastrous to industry and commerce." In 1880 there were only 28 granges in the State, with about 1,000 members.

Granges are not, like incorporated societies, legally qualified

to hold real property. They do occasionally own their meeting hall, but only as a matter of private association, and more usually their meetings are held in the local townhall, or the school, or a hall belonging to any of the societies. They are not charged with holding institutes, nor with the distribution of bounties or premiums, and have therefore little need of funds. In fact, the annual budget of this State Grange only amounts to about 900*l.*

The work of the grange is mainly directed to keeping the farmer in easy contact and intercourse with his fellows, enabling him readily to receive any information he may need, and by social meetings of the subordinate granges to promoting closer union among the whole body of agriculturists. For this purpose the State Grange appoints each year from among its members inspectors of the subordinate granges (8 to 10 granges to each inspector), who, as well as the "master" of each grange, make an annual report at the meeting of the State Grange. These inspectors act as organisers, and, if need be, lecture at grange meetings, and advise on all subjects connected with the proceedings and ceremonial. For there is a good deal of ceremonial connected with the grange, or, as it is sometimes styled, "Order of Patrons of Husbandry," forms and ceremonies being used somewhat similar to those of freemasonry.

National Grange.

The "National Grange" is the meeting of all the State granges, and is held in a different city each year. In 1892 it was held at Concord, New Hampshire, in 1893 at Syracuse, New York, and was attended by 57 voting delegates from 29 States of the Union, and at the public reception fully 3,000 people were present.

National Farmers' Congress.

I may here observe that besides the National Grange there is a totally separate annual meeting called the "Farmers' Congress," which is also a national affair, held each year in a different city, and attended by representatives from all the States. In 1892 the "Farmers' Congress" assembled at Lincoln, Nebraska. In 1893 the meeting was held at Savannah, in Georgia, and was attended by delegates from 24 States.

Farmers' clubs.

Finally, there are the "farmers' clubs," of which there are at present 43 in the State, besides six which are called farmers' and mechanics' associations. These each have a regularly appointed president and secretary, and, though not ranking as incorporated societies, have, most of them, a legal status, and under the latest regulations may become corporations, and, as such, hold real and personal property not exceeding 10,000 dol. (2,000*l.*) in value.

Summary of educational advantages.

We have, therefore, in Massachusetts:—

The agricultural college.
2 experiment stations.
The Weather Bureau at ("Hatch Station.")
38 incorporated agricultural societies.
135 institutes held by these societies.
35 fairs also held by them.
1 State grange.
120 subordinate granges.

Numerous meetings and several fairs held by the granges.

43 farmers' clubs.

And the State Board of Agriculture, with its dependent offices, the dairy bureau, the cattle commission, and other departments incessantly occupied in advising and supervising all these institutions without maintaining any stringent control over them, but rendering assistance whenever sought, and serving as a medium of communication and diffusion of knowledge through its various annual, monthly, and weekly publications.

Massachusetts is in the van of all organisation and progress, but the other States afford much the same facilities for farmers to make themselves masters of their profession, and to enable them to overcome the difficulties that beset them, and solve the problem of making their farms pay under the altered circumstances of the times.

Whether our people have much to gain by a closer study of these methods or not, I really do not know, but I have thought it my duty, at any rate, to bring the matter to the attention of those who are competent to judge, and only regret that my part of the work is not better done. It is the ability, not the will that is wanting.

Report on Agriculture in the State of Massachusetts for 1893.

From the Forty-first Annual Report of the Secretary of the State Board of Agriculture it appears that the year 1893 was one of hardly average profit to farmers.

The majority of the Board's correspondents reported that the season was either a poor one or not up to the average. Very few referred to it as more than average. This result was in great measure due to the drought of the early season which cut short many of the crops, and partly to the slow sale of agricultural products: due to hard times in other trades.

Weather report.

The weather was exceptionally cold in the early part of the year; the thermometer falling as low as 23° on one day in January, and there was a fall of snow which reached 6 feet 6 inches in depth at Monroe; slight frost occurring as late as May. Later in the year there were some very great storms, one on August 6 was almost a tornado, and did immense damage in some localities. The storm of August 29, too, though not causing loss of life and property as it did in the southern States, did damage also in New England to a value of many thousand dollars.

The first snow of any amount fell on November 4, and it was general on the 15th, a fall of 14 inches occurring at Monroe. December was wet and slightly cooler than the average. On November 4 it was quite warm along the coast, and the 25th was one of the warmest Christmas days on record. On other days, however, there were falls of snow varying from 8 inches to 35 inches, and considerable damage was done to fruit trees by ice storms on the 3rd and 14th to 16th of the month.

Season opened late. Crops generally were 2 weeks later than the previous year. The bloom for apple trees was below the average; but other fruit trees and early berries had an unusually full bloom.

Insects. Insects, particularly the tent caterpillar, did not appear to be as numerous as usual.

Labour prices. The average prices paid to farm hands were 20 dol. (4*l.*) per month with board, and 35 dol. (7*l.*) per month without board; while for day labourers 1 dol. 50 c. (6*s.*) was the ruling price.

Maize The average of Indian corn was practically the same as in former years; and, though backward, it was of good colour, and otherwise was doing well in the early part of the year, but was injured by the gales in August, and resulted in a three-fourths crop on the average.

Hay. Hay, on the whole, gave an average crop, secured in excellent condition; the weather having been favourable for harvesting, and the quality first class.

Potatoes. Early potatoes were a light crop, with a ruling price of 1 dol. (4*s.*) per bushel. Late potatoes, except in Barnstable county, were below an average yield; but the quality was generally reported good, and only five complaints of rot were received.

Market garden. Market garden crops were generally reported to be about average in yield and price, though Arlington reported small crops and low prices.

Berries. Berries generally yielded well.

Rye. Rye was rather better than an average crop.

Barley and oats. Barley and oats were full average crops, oats doing particularly well.

Tobacco. Tobacco suffered severely from drought, both in yield and quality; and the crop fell short of that of 1892.

Early fruits. Early fruits, with the exception of apples, were a fair crop, and late ones promised well until the severe storms at the latter part of August.

Apples. Apples were a very short crop at best, and in many localities proved a total failure.

Cranberries. Cranberries were a full average crop, and possibly a little above the average, the correspondent for Barnstable referring to the crop as the largest ever harvested.

Root crops. 75 correspondents reported root crops to have been average, or more than average, and 26 less than average.

Farm stock. Nearly three-fourths of the correspondents spoke of farm stock as being in either average, good, or excellent condition. In all but a very few localities, concentrated commercial feed stuffs were relied upon to help out the fodder ration of the dairy stock. The general practice seemed to be to use corn-meal, bran, shorts or middlings, or a combination of two or more of these in conjunction with cotton-seed meal, gluten-meal, linseed-meal, or gluten feed.

Autumn seeding. Autumn seeding was reported as in good condition generally.

Judging live stock An important decision with regard to judging live and dead stock was come to by the Board of Agriculture at the annual meeting of 1893, when it was voted "that in awarding premiums

especially on live stock, vegetables, and fruits, there shall be established by this Board a scale of points which shall be adopted by all the societies; so that there shall be a uniform standard throughout the State." Also "that in judging of all live stock, vegetables, and fruit, each society shall employ an expert or experts." The executive committee took charge of the matter, and scales of points for judging vegetables (illustrated by cuts of types), fruits, horses, sheep, swine, poultry, and the various breeds of cattle, were prepared and furnished to the several societies for use at their fairs of 1893. It is believed that Massachusetts has taken the lead in this matter, and that no other State Board of Agriculture has similar requirements.

Abandoned farms.

With regard to the abandoned farms, which have been the subject of so much discussion, and led, in some quarters, to the belief that farming in this district was proving a failure, it is interesting to note that the effect of circulating catalogues of detailed information has been the means of finding purchasers for a considerable number of them. A first edition of the descriptive catalogue was sent out on December 5, 1891. Three subsequent editions have been published, in the last of which 383 farms are described. Of these 108 have been reported sold, 53 owners wished to have the description withdrawn, and only 189 desired the description to be continued in the next edition. Several who wished the description withdrawn, stated that they expected to sell the farm at an early date, while several others stated either that they intended to occupy the farm themselves or to have it occupied by some member of their family.

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1894.

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No. 1381.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE AND FINANCE.

UNITED STATES.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF THE DISTRICT OF THE CONSULATE-GENERAL OF NEW YORK.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1274.

Presented to both Houses of Parliament by Command of Her Majesty, MAY, 1894.

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1359.	Cadiz	1½d
1360.	Marseilles	1d.
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1364.	Callao	1d.
1365.	Piræus	2d.
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UNITED STATES.

NEW YORK.

Consul-General Booker to the Earl of Kimberley.

My Lord, *New York, May* 2, 1894.

I HAVE the honour to transmit herewith my Annual Report upon the Trade of New York, with some information in regard to other parts of my Consular District.

I have, &c.

(Signed) WM. LANE BOOKER.

Report on the Trade and Commerce of the Consular District of New York for the Year 1893.

ABSTRACT of Contents.

	PAGE
General remarks—	
Review of trade	2
New York Clearing-House returns	3
United States, agricultural report	4
Stock market	4
Imports	5
Exports	5
Customs receipts	5
Money market	5
Bank returns	5
Banks of deposit	6
Savings banks	6
Sterling exchange	7
Failures	7
State of city finances	7
Trade and commerce—	
Dry goods	8
Grain shipments	10
Ocean freights	10
Public works—	
Canal traffic	12
Railroad traffic	13
Labour	14
Immigration	16
Vital statistics	17

Abstract of Contents—continued.

	PAGE
Return of shipping—Annex A	18
„ exports „ B	19
„ imports „ B	21
„ exports and imports by countries—Annex C	21
„ of seamen—Annex D	22
Providence, Rhode Island—	
General remarks—	
Review of trade	23
Wages	23
Bank clearings	23
The panic	23
Jewellery business	24
Machinery	24
Cotton and woollen goods	24
Electric cars	24
Return of shipping—Annex A	25
„ imports and exports—Annex B	25
„ „ by countries—Annex C	26

General review of trade.

The year 1893 was one of almost unprecedented depression. In the earlier months there was a fair demand for merchandise of all descriptions, but the silver question agitated the minds of those connected with financial operations from the first, and when large shipments of gold were made in the spring the distrust reached its climax, and it became evident that nothing could remove it but the repeal by Congress of the Sherman Act compelling the purchase by the Treasury Department of 4,500,000 dol. of silver monthly.

On April 15 the Secretary of the Treasury announced the suspension of the issue of gold certificates by the Treasury for gold deposited, which caused much alarm, increased by a report that he would no longer redeem in gold the coin notes issued for silver purchases, and a suspension of gold payments seemed imminent, but on April 24 the President announced positively that he and his Cabinet were unanimous in their determination to preserve the parity between gold and silver, and between all financial obligations of the Government. This restored confidence for the time being, but the silver question was ever present to cause distrust, and business went from bad to worse, as reports came from the West and South of the suspension of numerous banks. In the 4 months ending with August, 145 national banks and 160 State banks, besides numerous savings and private banks, suspended.

Many of these banks showed assets far above their liabilities, and before the close of the year 78 national, 47 State, and many savings and private banks had resumed business. During the months referred to numerous manufactures and industrial works were closed, or partially so, under a continually-falling demand for their products.

Towards the close of the month of June the President called a Special Session of Congress to convene August 7, but this did not cause any material improvement in feeling, as stocks and

bonds of all classes reached their lowest quotations in July and August.

In June the demand for currency from all points was an absorbing feature, and the issue of loan certificates for use by the associated banks in this city in settling balances at the clearing house was resorted to, under the rapidly-decreasing bank reserves, to prevent serious disaster. By the end of August this demand ceased under considerable importations of gold, large issues of loan certificates, and the repeal of the Sherman Silver Act by the House of Representatives.

Early in September the bank reserves were above the legal requirement, and at the close of the year amounted to 80,815,150 dol. against 64,724,100 dol. in July, 1885, the highest point ever reached before.

The anticipated improvement in business was delayed by the long debate in the Senate on the Silver Repeal Bill, but as the prospect of its passage became more certain there was a considerable advance in the value of almost all stocks and bonds, but when the Act was passed and became law on November 1 there was no activity in either general business or on the Stock Exchange, and this lethargy continued till the year ended, the stagnation of the last two months being due in a great measure to the uncertainty as to what action Congress would take on the tariff question.

With the settlement of this a more active demand for goods may be looked for, as the depression of the year has not been the result of previous over-trading, but in this connection it must be borne in mind that the means of a large class of consumers have been much reduced by the numerous bank failures, the closing or contraction of industrial works, and the low prices of all agricultural products.

New York Clearing-House returns.

The New York Clearing-House returns amounted in 1893 to 6,439,773,772*l.*, a decrease of 1,112,694,883*l.*, equal to about 14·7 per cent. on those of 1892. Since the establishment of the New York Stock Clearing-House it is impossible to eliminate the clearings for stock transactions and thus arrive at those of trade only, but these returns indicate even in their present shape the course of trade, and as the fluctuations were exceptionally great in 1883 I give in tabular form the percentages of changes in each month on those of the same month in the preceding year :—

Month.	Increase.	Decrease.
	Per cent.	Per cent.
January	0·4	..
February	..	5·2
March	..	0·03
April	..	8·7
May	2·5	..
June	..	6·5
July	..	7·2
August	..	22·7
September	..	33·7
October	..	27·6
November	..	25·6
December	..	32·4

United States Agricultural Department.

The reports of the United States Agricultural Bureau show the crop of wheat to have been in the whole country over 20 per cent. less than in 1892; of maize a little over; of oats rather less; and of cotton about 8 per cent. more, but the price of all were so low that the value of the above crops has been estimated at 17 per cent. less than in 1892.

Railroad receipts.

The gross receipts of the railroads of the whole country in 1893 were less than in 1892, and the diminution in receipts would have been more considerable had the depression in trade extended over the entire year, and there had not been the large receipts on some of the roads in connection with the Chicago Exhibition.

Both the gross and net receipts of the first 6 months were in excess of those of the same period of 1892. 117,138 miles of road (a fair average of the whole) earned gross in the whole year about 1,700*l.* per mile, and net 524*l.* per mile. In 1892 the same roads earned about 1,730*l.* gross, and 542*l.* net per mile.

The loss was not due to competition as to rates, but to a decrease in the quantity of merchandise and number of passengers passing over the roads. As the receipts fell off great efforts were made to reduce the operating expenses. 2,630 miles of road were constructed in 1893, against 4,062 miles in 1892. The States in which there was greatest activity in building were Pennsylvania, North Dakota, Florida, Texas, Georgia, Maine, and Missouri.

Stock market.

The stock market was at its best in the first quarter of the year, and few railroad stocks maintained the quotations of that period subsequently. The first serious blow was given by the Philadelphia and Reading going into a receiver's hands, and the history of later transactions is told in the depression referred to in the general review.

Bonds were better supported than stocks, but in July and August the average quotation of leading railroad bonds was nearly 25 per cent. below those current at the commencement of the year.

In the later months there was an improvement in the value of stocks, and notably of good bonds. The Stock Exchange Clearing-House has proved a success, and in the year a great many leading stocks have been added to the list of those cleared through it.

The value of merchandise imports (excluding specie) was 108,967,838*l.*, about 7·60 per cent. less than in 1892. Of these 55 per cent. entered on the free list, against 55·55 per cent. in 1892. The average of duty paid on dutiable merchandise entered for consumption and withdrawn from bonded warehouses was 47·62 per cent. Imports.

The value of merchandise exports was 73,771,938*l.* (excluding specie), a falling-off of 5·25 per cent. Exports.

The customs receipts at this port were 23,801,000*l.*, against 27,050,000*l.* in 1892; 25,291,000*l.* in 1891; and 33,627,000*l.* in 1890, the year (October 1) the present tariff came into operation. Customs receipts.

Money Market.

In 1893 the fluctuations in the money market were enormous, varying on call loans from 1 per cent. to 50 per cent. (6 per cent. with $\frac{1}{8}$ of 1 per cent. per day), but the very high rates did not last more than a few days at a time. Money market.

From March till the first week in August, at times, the extreme rates were paid, but ordinarily the range was from 2 per cent. to 5 per cent.

In the latter part of August and in September loans were easily obtained at from $2\frac{1}{2}$ per cent. to 5 per cent., the rates gradually getting easier till the close of the year, those current in November and December being 1 per cent. to 2 per cent.

Merchants found extreme difficulty in discounting good commercial bills at any rate of interest from March till August, their own bankers rendering them but scant assistance. From January to the early part of March $4\frac{1}{2}$ per cent. to 6 per cent. were the ruling rates, after which they were advanced to 7 per cent. to 12 per cent., remaining at these figures till the middle of September, when the money market became easy and merchants could get all they wanted on approved commercial paper at 6 per cent. to 8 per cent.; after September rates gradually fell to $3\frac{1}{2}$ per cent. to $4\frac{1}{2}$ per cent., the ruling quotations at the close of the year.

The condition of the associated banks of this city at different periods of the year is shown by the following table:— Bank returns.

AVERAGE Amounts of Associated Banks of New York City.

1893.	Loans.	Specie.	Legal Tenders.	Deposits.	Circulation.	Surplus over Reserve required against Deposits.
	£	£	£	£	£	£
January 7	90,986,330	15,480 360	9,324,810	92,034,600	1,151,550	1,843,804
April 8	89,526,760	14,751,855	9,761,050	90,453,320	1,165,220	1,899,578
July 8	86,326,990	12,743,030	6,780.230	82,201,920	1,179,240	1,047,732*
October 5	81 060,165	17,396,430	9,135,050	82,514,620	3,080,410	5,902,820
December	85,019,300	21,630,820	19,558,040	101,608,720	2,804,550	1,578.644

* Deficit.

Banks of deposit.

The annual report of the Superintendent of the State Banking Department for the fiscal year ending September 30, 1893, has been presented to the Legislature, and from it I extract the following:—

"Since my last annual report, the banks of deposit and discount have encountered a period of financial revulsion, which has exceeded anything in the previous experience of most, if not all, of them.

"The panic of 1893 differed materially from any other panic of recent history in the matter of its duration, commencing as early as February last, and extending through the entire summer and well into the autumn, before the excitement attending it had abated, if it may be said that it has entirely abated up to the present time.

"The causes which led to the experiences of the past season have been many, prominent among which was the entrenching upon our gold reserve on account of our European settlements in the early stages of the depression, and later on the agitation of the silver question, which has resulted in temporary relief, at least, in the repeal of the purchase clause of the Sherman law. During this period a great lack of confidence was developed in the stability of our moneyed institutions. Extreme demands were made upon these institutions, both by the withdrawal of deposits and their inability to procure the requisite amount of money demanded by customers; the currency withdrawn from the banks having, to a large extent, been retired from circulation by being locked in safe deposit vaults and held in other places of safety; and for a large portion of the past summer currency demanded a premium in very many instances, and the banks never before experienced such a trying condition in this respect. In the latter part of the season, and in anticipation of the repeal of the Sherman Silver Law, money commenced to emerge from its temporary hiding places, confidence returned, and at present there is a large amount of idle money in the banks of this State."

During the last fiscal year, and including the "very trying period above alluded to, with 208 discount banks in operation in this State, there were but five suspensions having an aggregate capitalisation of 1,608,000 dol."

Sixteen new banks were organised in the year in the State with an aggregate capital of 376,300*l.*; three of these were in this city and three in Brooklyn.

Savings banks.

The savings banks of this city and State suffered in common with other financial corporations in the reduced value of their securities, and in the large withdrawal of deposits during the general distrust; in July and August many felt compelled, in the interest of all depositors, to require the notice of withdrawal—30 to 60 days—provided in their bye-laws; notwithstanding the large amounts withdrawn, the deposits at the close of the year were only about 2 per cent. less than they were on January 1, and amounted to over 127,000,000*l.*; the dividends paid depositors were the same as in the past few years, 3½ per cent. to 4 per cent

TABLE showing the Rates of Bankers' Sterling Exchange for the Year 1893.

Month.		At 60 Days.
		Dollars.
January	highest ..	4·88½
	lowest ..	4·86
February	highest ..	4·89
	lowest ..	4·86
March	highest ..	4·89½
	lowest ..	4·85½
April	highest ..	4·90
	lowest ..	4·86
May	highest ..	4·90
	lowest ..	4·85½
June	highest ..	4·90
	lowest ..	4·82
July	highest ..	4·86
	lowest ..	4·81
August	highest ..	4·88½
	lowest ..	4·81½
September	highest ..	4·88
	lowest ..	4·82
October	highest ..	4·84½
	lowest ..	4·81½
November	highest ..	4·87
	lowest ..	4·82
December	highest ..	4·88
	lowest ..	4·84½

Failures.

In the following table, taken from Dun's Commercial Agency Report, will be found the number of failures together with the liabilities of manufacturing and trading establishments in 1893 and 1892, in New York, the other States of my district, and the whole of the United States :—

	Number of Failures.		Amount of Liabilities.	
	1893.	1892.	1893.	1892.
			£	£
New York	1,916	1,119	17,510,070	3,460,800
Connecticut	234	160	638,175	217,000
New Jersey	322	138	986,350	310,000
Rhode Island	181	136	213,325	263,100
Delaware	35	21	133,080	14,000
Whole of United States ..	15,242	10,334	71,501,008	21,433,100

State Debt.

The State gross indebtedness has been reduced to a nominal sum. In 1868 the State indebtedness had reached the highest point, about 9,250,000*l.*, since which it has been periodically reduced until it reached its present satisfactory condition. The tax rate for the year was 2 dol. 58 c. per 1,000, the total being about 2,150,000*l.*

New York City Debt.

The total funded debt of the city of New York amounted at the close of 1893 to 34,323,900*l.*, against which there was a sinking fund of 13,548,132*l.*, leaving a net funded debt of 20,775,768*l.*

TABLE showing the Valuation and Taxation for the Past Five Years.

Year.	Real Estate.	Personal.	City Tax.
	£	£	Per cent.
1893	322,181,936	76,481,677	1·82
1892	310,010,350	66,612,092	1·85
1891	301,635,050	66,529,806	1·90
1890	288,047,740	61,529,806	1·97
1889	274,305,127	56,085,729	1·95

Of the personal estate in 1893, 53,192,504*l.* belonged to residents, and remainder to non-residents and shareholders of banks.

Trade and Commerce.

Dry goods.

The history of the dry goods trade during 1893 is that of one of the most trying periods it ever experienced, which must, moreover, have proved far more calamitous, but for the substantial character, and ample capital, of the leading organisations engaged in it, strengthened by the remarkable accumulations of the successful years preceding.

As stated in my last, 1892 had been a year of almost unexampled progress and prosperity. 1893 opened satisfactorily, and for the first 3 months transactions were very nearly or quite equal in volume to the previous year, values being also well maintained. During the next quarter, fears as to currency complications began to cause more general anxiety, and by May came the earlier stages of the panic, which increased in June and culminated during July, August, and September, almost in a paralysis of trade and industries.

During the last quarter of the year, recovery was slow, but the trade emerged from the panic with a notable absence of great disasters. Doubtless this was largely owing to the prudence of merchants in the foreign trade, which led them early in the year, in anticipation of tariff changes, materially to curtail their operations.

Cottons.

Production for the first half of the year continued very nearly on the usual scale, but by midsummer came increased difficulty in disposing of goods, accumulating stocks, and consequent stoppage of machinery.

The accumulation, however, was more in coloured goods, especially in ginghams, than in other fabrics, and two or three large auction sales were resorted to in order to force distribution of this merchandise.

Prices obtained at these sales, however, were in many instances so close to previous selling rates, as to impart considerable firmness to the market, and the year closed without any large general decline ; though with indications that remaining stocks, especially in view of a plentiful supply of cotton, would not be disposed of without important concession.

Mills avoided, for the most part, long periods of cessation of work, by the adoption of short time (thus gain the advantage of keeping their hands together, besides reducing their output perhaps one-third) or working 5 days of 8 hours weekly, against 6 days, of 10 hours each, or a difference of 40 as compared with 60 hours.

Woollens. Besides the adverse influences in general trade already referred to, this class of manufacturers has been peculiarly depressed. The tariff reductions were expected to be greater than on other fabrics, while free wool, if its admission became a fact, would seriously affect costs of all descriptions. This element is still in doubt, and little can, therefore, be definitely said as to the situation, beyond the fact that during the last half of the year probably one-third of the machinery in the north and middle States was at a stand-still.

Silks. The same influences, in some respects even to a greater extent, have influenced this branch of industry, which has also had to contend with strikes of work people, and it will probably take another year to adjust the questions produced by the latter element, and the effect of the anticipated change in duty.

But the manufacturers seem sanguine as to their ability in the long run to overcome all obstacles.

TABLE showing the Total Grain Shipments from this Port to Great Britain and the Continent of Europe with the Nationality of the Vessels Engaged in the Transport.

Country.	Number of Vessels.	Number of Bushels.
Great Britain	606	34,383,778
Belgium	76	5,240,242
Netherlands	92	4,651,111
Germany	130	4,356,399
France	43	2,400,269
Portugal	29	2,213,108
Denmark	24	988,652
Italy	13	813,516
Spain	6	597,149
Norway	6	124,502

Of the above only 1 British and 2 German were sailing ships
The grain shipments consisted of:—

Articles.	Quantity.
	Bushels.
Wheat	37,140,391
Maize	11,302,910
Oats	4 315,715
Rye	384,857
Barley	254,974
Buckwheat	248,746
Flaxhead	1,8[illegible]83
Peas	265,851

Review of the Freight Market during 1893.

Ocean freights.

The year opened, as its predecessor had closed, with the carrying trade from the United States in anything but a healthy condition. The inquiry for our cereals was extremely limited during the first half of the year, whilst the same dulness existed in all the other branches of our export trade. The rates secured during this period were altogether of an unprofitable nature, and the stagnation in business was felt most keenly by the many steamers which were engaged in regular trades. No improvement took place until well towards the middle of the year, when the financial troubles, through which this country was compelled to pass, and which were directly attributable to the silver question, had brought about a cheapening of breadstuffs, which enabled our exporters to meet the competition of the other grain exporting countries. The movement of our cereals to European markets received thereby a new impetus, and as a consequence, quite an advance took place in steamer freights for full cargoes, as well as for shipments in parcel lots. Owners were once more enabled to secure business on a living basis, although the margin for profit was largely reduced by the scarcity of outward cargoes, and the absence of these freights was felt seriously for the balance of the year. The improvements, however, which have been made by British shipbuilders in the construction of cheap and economically run freight boats, have allowed the largest class of these vessels to accept the employment offered by our markets, in spite of the fact that owners were compelled to send them across in ballast, and it is therefore but right to assume that a profit, although doubtless only a very meagre one, was earned by this description of freight carriers. Medium sized and smaller boats, however, could not afford to run out in ballast, and it is no doubt largely due to the absence of outward cargoes that the supply of tonnage was kept well within our actual requirements, and that rates were fully maintained until the close of the year. As soon as the full force of the early grain movement had spent itself, the cotton ports commenced to inquire for steamer tonnage, and this demand was also instrumental in preventing a reaction in freight rates.

Although no new steamship lines were inaugurated during the year, the scope of several of the lines already in existence was

extended by the addition of very large freight boats, and a regular packet service of such vessels is gradually becoming a feature of several companies, which have heretofore been giving their principal attention to the passenger traffic.

The complete failure of the hay crop in many ports of Europe has given our liners a new element of freight, and has been the means of affording employment to an additional number of boats at rates which were exceptionally profitable during a good portion of the year.

Cotton business has shown its usual activity, and the rates secured have been of an entirely satisfactory nature.

The export of phosphates has been on a larger scale than during previous years, especially from ports in Florida, and steamers have found paying employment in this trade.

The decline in silver has not been without influence upon our trade with the far East, and the sharp fluctuations of this metal have at times brought this business to a complete suspension. On the whole, however, the shipments of case oil by steam were of fair volume, and quite a number of steamers were enabled to secure acceptable occupation.

The coal trade of the United States has made further advances in Mexico, Central America, and the West Indies, and has become a competitor with which British coal interests will have to reckon seriously in the future.

In summing up the business of 1893, so far as steam tonnage is concerned, it can be stated that our export trade has offered owners fairly remunerative employment during the second half of the year, and although all European countries are increasing their fleet of steamers, the carrying trade from this continent has again been mainly in the hands of vessels flying the British flag. The encroachment of steam upon the field of the sailing ships shows further development, and in consequence of the low rates of freight which have been current in our ports, the number of sailing craft which entered the same during the year 1893 has again diminished considerably.

Rates in all directions for sailing vessels have been most unprofitable during the whole of the year, and at times it has been extremely difficult to secure business at any price. A momentary scarcity of tonnage alone has enabled vessels to secure a slight improvement in rates.

Petroleum business to Europe has been particularly slow, and the export trade being now practically controlled by the all-powerful Standard Oil Company, we are fast approaching the period when the whole of the oil trade will be handled by tank steamers, possibly with only an occasional demand for a sailing vessel to fill some special trade.

The case oil trade to the East is likewise passing into the hands of the Standard people, although in this branch they are still meeting with considerable opposition. Shipments of oil to China, Japan, and the East Indies, by sail, have been made at very low rates of

freight, and owing to the uncertainty of silver business has been largely of a hand-to-mouth nature.

Timber freights from southern ports of Europe have been ruling low, but on account of the scarcity of tonnage a slight improvement was noticeable during the latter part of the year.

General cargo business has also been very quiet during the year, and large vessels had to accept unsatisfactory rates of freight to Australia and other ports, whilst handy small vessels could occasionally command somewhat better prices.

Public Works.

Canals

The report of the Superintendent of Public Works on the trade and tonnage of the canals shows that 4,331,963 tons (2,000 lbs.) passed through the canals in 1893, about 50,000 tons more than 1892; of this tonnage—

	Quantity.
	Tons.
The Erie Canal carried	3,235,726
Champlain Canal carried	848,265
Oswego Canal carried	92,634
Black River Canal carried	115,877
Cayuga and Seneca carried	38,761

Comparing the season with that of 1892, there is a loss of 172,174 tons upon the Champlain Canal, and a gain of 256,894 tons upon the Erie; this gain is made up principally by increased shipments of wheat and other cereals, the receipt of which at this port increased from 25,496,287 bushels in 1892, to 43,076,900 bushels in 1893. Out of a total quantity of 110,024,317 bushels received here during the season of canal navigation in 1892 the canal delivered 23·17 per cent. of the entire amount, while in 1893 out of a total quantity of 108,962,706 bushels the canal carried 39·53 per cent. of the entire amount.

The shipments of grain by canal from Buffalo increased from 31,836,648 bushels in 1892 to 48,121,586 bushels in 1893.

The chief reasons for this increase has been that the price paid for carrying freight has been remunerative. The season of 1892 was made unprofitable to the boatmen for the reason that the rate established by the trunk lines of railroads was so low that boatmen could not compete with it, the result was that the business of carrying grain was alike unremunerative to the boatmen and railroad companies.

The tonnage of the canals was composed mainly of the following described articles:—

Articles.	Quantity.
	Tons.
Products of the forest	1,030,604
„ agriculture	1,544,146
Merchandise	216,013
Manufactures	66,892
Anthracite coal	662,837
Bituminous „	79,097
Stone, lime, and clay	572,378
Iron ore	102,275
Domestic salt	51,360
Iron and steel	23,723

The Governor of the State in his recent message to the Legislature states in reference to the Erie Canal that:—

"The Erie Canal was built three-quarters of a century ago to divert the flood of agricultural wealth of the west from outlets to the sea by way of Canada or the Mississippi River.

"The policy poured the treasures of the new country at the feet of New York and built up her great cities. As much now as ever before in her history does the State of New York need the maintenance of substantial waterways.

"No narrow or short-sighted policy should permit this tide of commerce between East and West to be turned away from New York.

"To-day Canada aspires to contest with us for the traffic of the Great Lakes. She has already spent upward of 60,000,000 dol. in improving and building canals and in deepening channels. She is constructing a new canal through her territory at the Sault Ste. Marie, and is making a channel 14 feet deep all the way from Lake Superior, through the Welland Canal and St. Lawrence River to the sea. When that is completed a 2,000-ton boat can go from Duluth to Montreal, Halifax, or Liverpool.

"To meet this competition the United States Government is making a 20 feet channel through the Lakes to Buffalo. When it is completed, a 3,000-ton boat can come as far as Buffalo, and from that point freight must find a cheap and easy outlet to the seaboard. Here is where New York's interest lies, and where the necessity of utilising the advantage of the Erie Canal is vital."

Railroads.

Railroad traffic.

During the year 1,414,736 tons (2,000 lbs.) were sent westward from New York to Buffalo, Pittsburg, &c., by the railroads, and 4,264,654 tons were received, originating at or west of Buffalo, Pittsburg, &c.

The railroads carrying this freight consisted of the New York Central and Hudson River; Pensylvania; New York, Lake Erie and Western; Baltimore and Ohio; West Shore; Delaware, Lackawanna and Western; Lehigh Valley; New York, Ontario and Western.

In 1892 the westward freight was 1,576,239 tons, and the eastward 5,402,998 tons.

Labour Market.

Labour.

The reports of the Labour Bureau and Board of Mediation and Arbitration of this State are not yet ready for distribution. I learn from a synopsis of them that in reply to a series of questions sent to manufacturers by the Commissioner of Labour, 1,460 stated that they did not reduce wages, and 494 that they did. A large number, by agreement with their employés, cut down working hours; this was in the latter half of the year, when the stagnation of trade had become very marked.

The Board of Mediation and Arbitration reports that the wage earners recognised generally the stagnation of trade, and refrained from making demands, and that employers in many cases made great sacrifices in order to retain their workmen in employment.

Many were forced to make reduction in wages temporarily, and, in nearly every instance, they were met in a spirit of intelligent acquiescence by their employés. There were a number of strikes in connection with the clothing trade, but they were not of great importance, and were in most cases settled through the mediation of the Board.

The Board makes the following report in regard to a somewhat serious labour trouble at Tonawanda adjoining Buffalo:—

"During the spring and early summer, a rather peculiar phase of labour trouble presented itself at Tonawanda. It was not a strike, nor could it be correctly denominated a lock-out.

"A strike had occurred the previous year among the lumber shovers, the handling of lumber being the chief industry at this point. The men had formed the Lumber Shovers' Protective Union. The opening of navigation for the season of 1893 found the men thoroughly organised. They prepared a schedule of wages and other conditions for presentation to the Lumbermen's Association. It was claimed for the latter that relations with their old employés ended with the close of the season of 1892.

"While the lumbermen made no strenuous objection to the schedule of wages, they refused to recognise the Lumber Shovers' Union in the employment of men for the season. The men insisted upon its recognition and declined to apply for places as usual at the opening of navigation on the lakes each year. The Lumbermen's Association then secured labourers in Buffalo, transporting them in trains from that city to their lumber yards at Tonawanda every morning, and returning them every evening.

"A member of the Board went to Tonawanda and conferred with the officers of the Lumbermen's Association, and of the Lumber Shovers' Union, but failed to secure an adjustment of the differences.

"On June 13 the Board met in Tonawanda, and, upon its invitation, the executive committee of the Lumbermen's Association appeared and stated their position. The employers were still firm

in their determination not to recognise the Union, and presented an ultimatum regarding the re-employment of old men individually before a certain date.

"A committee of the men at the same hearing rejected the ultimatum. A committee of citizens of Tonawanda then undertook to effect a settlement.

"On June 16 the new workmen employed in the yards went on strike and threatened violence because they did not immediately receive the wages due to them. The deputy sheriffs and police officers were unable to control the riotous workmen, and by direction of the Sheriff of Niagara county two companies of militia were placed on guard in the lumber yards.

"These soldiers were later relieved by three other companies, the militia remaining on duty for 3 weeks. Upon a protest from the commanding officer against the employment of the State militia as ordinary watchmen the soldiers were relieved from further duty. A number of extra deputy sheriffs were then sworn in and found no great difficulty in preserving the peace.

"On June 26 a member of the Board again visited Tonawanda, and acted with a committee of citizens in an effort to settle the trouble. Committees of the Lumbermen's Association and of their former employés were also present at the meeting. New plans were proposed regarding the conduct of the business which were satisfactory to all parties concerned. But the Lumbermen's Association would not finally agree to anything that did not include the absolute disbandment of the Lumber Shovers' Union. The men pleaded that a benevolent protective feature was included in their society, and refused to disband. So for the third time negotiations failed.

"Finally, on July 10, when the working season was about half over, a number of the old men withdrew from their union and went back to work, thus ending the trouble."

In 1893 the Legislature of this State passed "An Act to provide for the weekly payment of wages by Corporations." The Corporations included in the Act comprised manufactories, mining, quarrying, lumbering, mercantile, railroad, other than a steam surface road, steamboat, telegraph, telephone, municipal water, and express. In the report of the Vice-Consul at Providence annexed to this it will be seen that the wages of employés in cotton mills in Rhode Island were reduced 10 per cent., and in woollen mills an average of $12\frac{1}{2}$ per cent.

A great many Bills affecting labour were introduced in 1893 into the Legislature of Connecticut, but only a few were passed. All affecting the hours of employment as a day's labour were thrown out.

The Bills passed were :—

A Bill making it unlawful for any person or corporation to counterfeit or imitate any label, trade mark, or form of advertisement adopted by any person, association, or union of working men. Also making it unlawful to use any such label knowing that such use is unauthorised, in and about the sale of goods or otherwise.

A Bill providing that every person, partnership, or corporation employing females in any mercantile, mechanical, or manufacturing establishment shall provide suitable seats for the use of said females when they are not engaged in the active duties for which they are employed.

A Bill giving the factory inspector power, when necessary for the preservation of the health of employés, to order the introduction and operation of appliances to remove dust from the atmosphere of factories. Also to order changes made for the improvement of the lighting or ventilation of factories.

A Bill providing that no person under the age of 16 years shall be employed in the care, custody, operation, or management of any elevator.

A Bill providing for the enclosure and security of elevators.

Immigration.

Immigration statistics.

There were 352,885 immigrants landed at this port in 1893; 21,856 less than in 1892. They were from the following countries:—

Country.	Male.	Female.	Total.	
			1893.	1892.
	Number.	Number.	Number.	Number.
Great Britain	13,107	6,878	19,985	21,797
Ireland	14,776	15,460	30,236	30,044
Germany	32,247	23,734	55,981	68,196
France	2,292	1,352	3,644	3,251
Russia	30,569	17,555	48,124	55,924
Sweden	16,399	12,566	28,965	31,850
Norway	7,960	4,902	12,862	12,807
Switzerland	2,563	1,455	4,018	5,041
Belgium	1,394	707	2,101	3,123
Holland	3,464	1,809	5,273	5,087
Italy	54,984	14,990	69,974	57,795
Spain	66	14	80	154
Portugal	2,147	1,251	3,398	2,541
Denmark	4,121	2,898	7,019	8,561
Austria	23,339	11,109	34,448	28,485
Hungary	16,608	6,693	23,301	23,208
Turkey	1,183	371	1,554	196
Greece	1,313	18	1,331	504
All other countries ..	1,182	702	2,184	14,970
Total	229,921	122,964	352,885	374,741

Their destinations were as follows:—

Destination.	Number of Immigrants.
North Atlantic States	244,349
South „	4,227
North Central States	89,778
South „	4,702
Western and Pacific States	9,829

1,504 immigrants were returned as coming within the proscribed class, of whom 1,105 were "contract labourers." Of the contract labourers returned, 370 were Austrians, 34 Hungarians, 391 Italians, 126 Germans, 62 Russians, 48 British, and 38 Irish. The others were of various nationalities.

VITAL Statistics of New York City.

	1892.	1893.
	Number.	Number.
Births	49,447	51,529
Marriages	16,001	16,144
Deaths	44,329	44,486

Of the deaths reported, 11,106 were under 1 year of age, and 17,865 under 5 years of age.

The causes of death were principally as follows:—

Cause of Death.	Number.
Phthisis	5,124
Pneumonia	6,487
Bronchitis	1,577
Diphtheria	1,970
Croup	588
Measles	393
Scarlet fever	551
Cerebro-spinal meningitis	469
Diarrhœal diseases	3,310
Heart diseases	2,379
Bright's disease	2,071
Typhoid	381
Typhus	200
Small-pox	102
Violence	1,968

Death rate for year, 23·52 per 1,000.

Annex A.—Return of all Shipping at the Port of New York during the Year 1893.

Entered.

Country.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Great Britain ...	850	474,278	1,636	3,130,746	2,486	3,605,024
United States ...	840	440,[illegible]	[illegible]	652,080	1,144	1,[illegible]
Germany	185	138,[illegible]75	330	890,670	515	1,[illegible]45
France	8	6,870	112	310,321	120	317,191
Sweden and Norway	103	76,508	208	114,405	311	190,913
Belgium	1	831	93	281,211	94	[illegible]42
Italy	115	82,340	22	32,588	137	[illegible]
Mexico	...	...	...	...	...	...
Netherlands ...	9	11,390	161	342,590	170	353,980
Austria	9	7,321	...	...	9	7,321
Spain	4	965	49	81,739	53	82,[illegible]4
Denmark	11	6,971	38	67,[illegible]5	49	74,[illegible]6
Other European countries	8	4,997	29	47,278	37	52,275
South America ...	...	...	...	...	...	...
Central America ...	...	...	...	...	...	...
Other countries ...	1	1,275	...	...	1	1,275
Total	2,144	1,312,841	2,982	5,950,733	5,126	7,263,574
,, for the year preceding ...	2,323	1,230,030	3,180	6,015,090	5,503	7,245,120

Cleared.

Country.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels	Tons.
Great Britain ...	874	4[illegible]8,850	1,607	3,[illegible]3,727	2,481	3,[illegible]77
United States ...	552	293,[illegible]72	369	[illegible]876	861	[illegible]
Germany	76	81,[illegible]27	377	1,[illegible]26	453	1,[illegible]23
France	4	3,428	109	306,667	113	31[illegible]95
Sweden and Norway	106	76,945	212	129,[illegible]13	318	1[illegible]58
Belgium	...	...	91	27[illegible]6	91	2[illegible]6
Italy	92	65,677	21	3[illegible]82	113	[illegible]59
Mexico	...	...	...	...	...	...
Netherlands ...	9	11,[illegible]90	152	320,652	161	332,042
Austria	10	7,428	...	...	10	[illegible]28
Spain	3	7[illegible]	47	79,[illegible]7[illegible]	50	[illegible]6
Denmark	10	6,349	39	68,[illegible]71	49	75,220
Other European countries	7	4,588	27	44,198	34	48,786
South America ...	...	...	...	...	...	...
Central America ...	...	...	...	...	...	...
Other countries ...	2	2,805	...	...	2	2,805
Total	1,745	1,021,874	2,991	5,983,428	4,736	7,[illegible]3,302
,, for the year preceding ...	1,940	1,059,302	3,102	5,971,200	5,042	7,[illegible]3,502

Annex B.—Return of the Principal Articles of Export from New York during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Agricultural implements	...	...	719,945	...	719,604
Bacon and hams	Lbs. ...	175,766,339	3,954,840	297,660,789	5,103,109
Beef—					
Fresh	,, ...	92,314,793	1,639,756	138,573,169	2,247,384
Canned	,, ...	29,820,155	476,780	45,457,225	723,711
Cured and salted ...	,, ...	36,715,617	447,245	45,221,597	509,702
Butter	,, ...	5,336,429	213,630	9,035,478	282,373
Cattle, live	Number ...	90,047	1,795,920	148,189	2,865,589
Cotton—					
Domestic	Yards ...	125,564,923	1,714,955	...	...
,, ...	Packages ...	...	..	189,988	2,654,555
Raw	Bales ...	810,935	7,080,230	728,015	6,230,435
Cheese	Lbs. ...	53,394,216	1,053,440	67,542,225	1,295,331
Coffee	,, ...	6,244,667	229,150	14,351,590	446,951
Flour	Barrels ...	6,050,226	5,421,170	6,034,260	5,629,291
Hops	Lbs. ...	15,373,555	722,520	8,092,294	403,890
Indian corn	Bushels of 56 lbs. ...	13,551,295	1,467,190	18,293,353	2,118,226
Lard	Lbs. ...	199,230,108	4,396,830	309,437,275	4,830,307
Oilcake and meal ...	,, ...	224,498,279	639,710	272,654,504	820,216
Oats	Bushels ...	4,163,713	342,750	2,650,659	216,510
Petroleum—					
Refined...	Gallons ...	471,611,582	4,553,610	397,267,085	4,654,497
Crude	,, ...	7,487,123	91,972	23,153,129	279,859
Lubricating	,, ...	26,203,691	802,770	25,124,444	852,542
Pork	Lbs. ...	37,172,265	706,230	48,967,694	643,919
Rye	Bushels ...	410,305	45,985	3,259,024	640,482
Sewing machines ...	...	...	437,800	...	496,292
Sugar, refined	Lbs. ...	7,496,040	81,720	9,113,543	91,662
Specie and bullion ...	...	...	22,143,924	...	19,231,526
Tallow	Lbs. ...	27,542,056	296,020	37,467,104	372,826
Wheat	Bushels of 60 lbs. ...	36,583,983	5,862,990	46,931,242	8,934,938
Other articles	...	...	67,249,130	...	22,697,185
Total	...	...	95,915,862	...	97,092,101

RETURN of the Principal Articles of Import to New York during the Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Cocoa	Bags ...	121,200	[illegible]	...	[illegible]
Coffee	...	...	19,765,102	...	[illegible]
China, glass, and earthenware	...	...	1,428,978	...	[illegible]
Cotton	Bales ...	32,735	363,467	...	[illegible]
Dry goods—					
Manufactures of—					
Cotton	...	...	4,282,667	...	[illegible]
Flax	...	...	3,379,674	...	[illegible]
Silk	...	...	8,484,476	...	[illegible]
Wool	...	...	5,186,914	...	[illegible]
Miscellaneous	...	...	3,055,147	...	[illegible]
Furs	...	...	1,620,743	...	[illegible]
Fruits	...	...	2,620,999	...	[illegible]
Hair	Packages...	17,320	187,379	...	[illegible]
Hemp	Bales ...	195,250	656,213	...	[illegible]
Hides—					
Dressed	...	...	625,088	...	[illegible]
Undressed	...	...	3,[illegible]	...	[illegible]
Hops	...	...	110,821	...	[illegible]
India-rubber	...	...	4,534,117	...	[illegible]
Jewellery, watches, and precious stones ...	...	...	2,163,573	...	[illegible]
Jute and jute butts ...	...	...	417,243	...	[illegible]
Molasses	...	...	70,144	...	[illegible]
Paper stock	...	...	544,184	...	[illegible]
Metals—					
Cutlery	...	...	215,136	...	[illegible]
Iron—					
Pig	Tons ...	6,779	27,116	...	[illegible]
Sprogel	... ...	6,753	[illegible]	...	[illegible]
Other	... ...	4,866	[illegible]	...	[illegible]
Steel	...	...	154,190	...	374,180
Tin—					
Plates	Boxes ...	1,934,367	1,451,776	...	[illegible]
Slabs	Tons ...	15,688	[illegible]	...	[illegible]
Soda—					
Ash	...	...	337,381	...	[illegible]
Caustic	...	...	[illegible]	...	[illegible]
Spices	...	...	[illegible]	...	[illegible]
Stationery and books ...	...	...	[illegible]	...	[illegible]
Sugar	Tons ...	929,152	[illegible]	...	[illegible]
Specie and bullion ...	...	...	[illegible]	...	[illegible]
Tea	...	...	[illegible]	...	[illegible]
Tobacco and cigars ...	...	...	[illegible]	...	[illegible]
Wines, spirits, &c. ...	...	...	[illegible]	...	[illegible]
Wood	...	...	[illegible]	...	[illegible]
Wool	...	...	[illegible]	...	[illegible]
Other articles	...	...	[illegible]	...	[illegible]
Total	...	...	[illegible]	...	[illegible]

TABLE showing Countries to and from which the Specie included in the above Tables was Exported and Imported during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	10,480,320	5,570,930	6,185,560	11,100
France	3,736,557	4,728,180	2,138,935	1,045,250
Germany	5,395,917	6,756,060	2,762,841	209,125
West Indies	1,837,847	1,662,526	1,624,149	445,550
Mexico	3,248	11,200	210,517	258,150
South America	270,171	494,630	492,689	352,600
Other countries ..	419,864	8,000	156,496	63,365
Total	22,143,924	19,231,526	13,571,187	2,385,140

Annex C.—TABLE showing Total Value of all Articles Exported from, and Imported to, New York, to and from Foreign Countries, during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain and Ireland	41,190,474	39,843,636	24,602,700	20,146,857
British possessions ..	7,547,243	5,854,534	9,326,188	7,632,953
Germany	12,036,220	13,643,616	16,527,076	14,072,321
France and possessions	7,063,490	9,332,606	13,312,763	13,757,265
Belgium	3,721,201	4,392,187	1,452,561	1,264,064
Spain and possessions ..	4,683,638	5,859,559	9,115,666	9,962,439
Netherlands and possessions	5,246,245	4,382,472	3,577,385	3,778,277
United States of Columbia	544,716	504,654	446,814	951,490
Central American States	566,165	513,847	939,630	1,028,945
Italy	1,219,948	1,191,847	3,506,253	3,831,309
Brazil	1,808,601	1,892,729	21,368,138	25,720,921
China	926,503	1,042,538	2,558,613	2,567,025
Denmark and possessions	756,272	1,015,787	134,961	154,407
Venezuela	1,222,422	1,104,855	1,141,529	1,528,572
Portugal	1,081,916	1,040,493	466,026	417,503
Argentine Republic ..	863,752	742,404	314,921	433,269
Mexico	693,069	954,588	3,198,099	2,411,299
Hayti	1,678,054	1,184,398	105,166	403,554
Sweden and Norway ..	669,689	614,328	529,308	511,708
Japan	331,389	357,679	1,889,614	2,185,524
Chile	452,351	535,573	589,112	579,134
San Domingo	284,725	369,752	575,798	411,151
Uruguay	191,558	163,313	250,533	360,464
Austria	33,111	61,481	1,637,553	1,347,133
Russia	213,170	121,935	538,441	650,306
Peru	112,153	143,453	135,314	151,049
Switzerland	1,393	1,605	2,800,954	2,597,512
Other countries ..	776,394	226,222	1,497,907	1,606,835
Total	95,915,862	97,092,101	122,539,023	120,403,286

ANNEX D.—RETURN of the Number of Seamen who have been Engaged, Discharged, Left Behind, Reported Dead, or Deserted, or who have been relieved at the British Consulate-General, New York, and showing the Total Number of British and Foreign Sailors who were Engaged, Discharged, &c., from British Ships, with the Amount of Wages paid at the Consulate to Seamen on discharge from their Ships and from Hospital or Jail; and also showing the Number of New Agreements entered into during the Year 1893.

Seamen.													Wages.			Agreements.
		Left Behind.			Dead.					Nationality.						
Engaged.	Discharged.	In Hospital.	In Jail.	Total.	At Sea.	On Shore.	Total.	Deserted.	Relieved.	British.	Foreign.	Total Number of Seamen.	Paid on Discharge from Vessels.	Paid on Discharge from Hospital or Jail.	Total Wages Paid.	Number Opened.
12,[illegible]5	10,360	247	22	269	49	32	81	,344	99	14,461	11,727	26,188	Dol. c. 426,381 49	Dol. c. 6,364 57	Dol. c. 432,746 6	181

PROVIDENCE, R.I.

Mr. Vice-Consul Stockwell reports as follows :—

General Remarks.

General report on trade.

The review of business for the year brings nothing cheering for the year 1894. Since the "hard times" of 1857 the State has not witnessed anything like that which took place in 1893. The disturbing elements began to appear early in the year, and before October business was at a standstill practically in many departments of trade and commerce. At this time 6,000 operatives in cotton mills, besides a large number of workmen in the building trades were idle.

Manufacturers reduced wages, and the operatives "struck." After six weeks or nearly two months some of the mills out of which came the strikers resumed work, while others remained closed, or in operation only a part of the time, and the result at the close of the year is that never in the history of the State have so many labouring men in the trades, and men in all departments of business been out of employment, and in the great army of the unemployed the foreigner predominates.

The State and the city, through its charitable and humane institutions, its churches, societies, both public and private, united and reorganised to relieve the widespread distress. Public works were established, and many idle men employed. Many of the benevolent men and women of the State and city have personally given their attention to the distribution of food and fuel. "Bread stations" were established in different parts of the city where bread could be had for the asking. Thus ended the year for a great army of labourers.

Wages.

During the year the wages of workmen in the trades have changed very little when there was demand for labour. Generally the pay was at established rates. In cotton mills wages were reduced 10 per cent., and in woollen mills the reduction averaged 12½ per cent.

Bank clearings.

The bank clearings for 1891 were 57,382,928*l.*; for 1892, 59,981,093*l.*; and in 1893, 57,018,329*l.*

The panic.

In August the uncertainty in regard to the future of business, the commotion caused by strikes, fluctuating values, a local and a favourite stock declining 60 per cent., led to a panic, and all banking institutions were called upon to pay deposits. With the exception of two banks, savings institutions were obliged to take advantage of the law requiring 90 days' notice of the intention to withdraw deposits. This was a fortunate provision for the banks, for the depositors' money was invested in property which had suffered a depreciation of more than 50 per cent. in many cases. Hence to realise at once would have been disastrous to the depositors, as well as to the banks. In this flurry two banks in this city suspended.

The story is similar throughout many branches of business.

While there was a cheerful outlook in the beginning of the year, yet at the end came disaster.

Jewellery business. Of jewellery establishments in the city of Providence there are about 201 auxiliary concerns. In a year of average prosperity the output of all these establishments is about 2,000,000*l.* During the year 1893 the product was little more than half the amount. Failures in the country numbered 360, with liabilities of about 400,000*l.*, half of which was owed to Providence creditors.

Tool-making and machinery. Tool-making and the manufacture of machinery of all kinds are prominent industries in the State and city. The course pursued in one large concern, the largest of the kind in the country, may give an idea of business generally in this line. At the beginning of the year 900 workmen were employed, and the number was increased to 1,050. After the middle of the year 500 men were discharged, and the works were closed for 2 months. In September the works started again, and added a few workmen, and thus ran to the end of the year.

Cotton and cotton goods. At the beginning of the year the price of cotton was 10$\frac{1}{8}$ c.; it fell to 7$\frac{3}{8}$ c., and closed at 8$\frac{3}{16}$ c. Business was dull and lifeless most of the time, and the same features characterised the cotton goods trade and the manufacture of goods. In the latter were many ups and downs, while many mills were running ostensibly full time and full help, yet all machinery was not in motion, and what was done was the result of a less number of operatives, that is to say, one operative attended to more machinery than before. In one case at least a strike occurred owing to the desire of the manufacturers to reduce the number of employés, and to require those remaining to keep all the machinery in motion. During the latter months of the year the cotton manufacturer doubtless lost money on plant.

Woollen goods. There is little to report in regard to the trade in wools, or in regard to the manufacture of woollens. To all inquiries comes the answer, "The less said the better." The report from all sources is more discouraging than that of the cotton trade. The depreciation in wools exceeds that of any previous year.

Electric cars At the close of the year only one line of "street railway" used horses as a motive power. The "cable" and the "trolley" have superseded horse-power.

Annex A.—RETURN of all Shipping at the Port of Providence during the Years 1893–92.

SAILING.

Nationality.	Entered.		Cleared.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	88	10,407	71	8,010
American	23	5,013	7	1,367
Italian	1	380	..	..
Total, 1893 ..	112	15,800	78	9,377
„ 1892 ..	97	15,205	78	11,026

Annex B.—RETURN of Principal Articles of Export from Providence during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
		£		£
Miscellaneous	..	..	..	49
Total	..	..	..	49

RETURN of Principal Articles of Import into Providence during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
		£		£
Dry goods	..	44,594	..	56,588
Chemicals	..	11,683	..	18,741
Metals (and manufactures of)	..	21,567	..	52,832
Rubber	..	146,795	..	..
All other articles ..	..	28,666	..	49,115
Total	..	253,305	..	177,276

Annex C.—TABLE showing Total Value of all Articles Exported from and Imported to Providence from and to all Countries during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Austria	..	..	7,062	5,252
Belgium	..	..	1,845	8,839
Brazil	..	..	117,284	..
British West Indies ..	..	..	7,750	4,660
Canada	..	46	8,657	12,285
Canary Islands.. ..	..	..	22	..
Cuba	..	..	2,876	4,338
Dutch West Indies ..	..	..	270	537
England	..	..	49,504	50,031
France	..	.	19,227	19,624
Germany	..	..	14,863	19,960
Hayti	..	..	2,702	2,869
Ireland	..	..	31	..
Italy	..	..	4,378	1,287
Japan	..	..	1,142	113
Netherlands	..	..	2,645	4,828
Scotland	..	..	2,711	5,778
Spain	..	..	2,448	847
Sweden	..	..	471	4,843
Switzerland	..	..	7,868	88
Turkey	..	..	49	87
All others	..	3	..	..
Total	..	49	253,305	146,256

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FOREIGN OFFICE.

1894.

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No. 1390.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE AND FINANCE.

UNITED STATES.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF THE CONSULAR DISTRICT OF NEW ORLEANS.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1205.

Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.

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1348.	Amapala	½d.
1349.	Cherbourg	1d.
1350.	Jerusalem	1d.
1351.	Santiago	1d.
1352.	San José	1d.
1353.	Trieste	3½d.
1354.	Madrid	2d.
1355.	Teneriffe	½d.
1356.	Havana	2d.
1357.	Paraguay	5d.
1358.	Guayaquil	4½d.
1359.	Cadiz	1½d.
1360.	Marseilles	1½d.
1361.	Brest	1d.
1362.	Syra	2½d.
1363.	Suakin	1d.
1364.	Callao	1d.
1365.	Piræus	2d.
1366.	Stettin	2d.
1367.	New Orleans	2½d.
1368.	Angora	1d.
1369.	Antwerp	2d.
1370.	Genoa	3½d.
1371.	Batoum	2d.
1372.	Rouen	2½d.
1373.	Santo Domingo	½d.
1374.	Nantes	1½d.
1375.	Taganrog	2½d.
1376.	Ispahan	4½d.
1377.	Leghorn	2d.
1378.	Cagliari	1d.
1379.	Boston	1d.
1380.	Palermo	3d.
1381.	New York	2d.
1382.	Zanzibar	2d.
1383.	Naples	1½d.
1384.	Constantinople	2d.
1385.	Buenos Ayres	5½d.
1386.	Caracas	1½d.
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No. 1390.

Reference to previous Report, Annual Series No. 1205.

UNITED STATES.

NEW ORLEANS.

Consul St. John to the Earl of Kimberley.

My Lord, *New Orleans, May* 5, 1894.

I HAVE the honour to transmit Agricultural Reports from New Orleans, Mobile, and Pensacola for the year 1893.

I have, &c.

(Signed) C. L. ST. JOHN.

Report on Agriculture for the Consular District of New Orleans for the Year 1893.

ABSTRACT of Contents.

	PAGE
New Orleans—	
Crop report	2
Cotton crop	2
Corn crop	2
Sugar-cane	2
Questions and answers	2–6
Tobacco, cultivation of	6
„ report on	6
„ cultivation continued	8
Table on agriculture	9
Pensacola—	
Cultivation of fruits and vegetables	10
Shipments of oranges to England	10
Cultivation of tobacco	11
Advice to prospective emigrants to Florida	11
Florida State Agricultural College	14
Phosphate	14
Mobile—	
Agriculture	15
Fruit farming	15
Stock	16
Cotton	16
Land value	16
Temperature	17

The past season has been one of varied prosperity. Some sections of the State have had their entire crops swept away by overflow, while others, for the want of rain, have been parched by the burning rays of the summer sun.

The financial distress of the entire country has been severely felt by all farmers of this State. Cotton, sugar and rice have brought less money this year than ever before. Various causes are given for the prevailing financial condition. Whatever the causes may be, farmers and planters are the immediate sufferers.

The cotton farmers of Louisiana have not been prosperous the past season, and the prevailing impression is that they are not so well off this year as last.

The same condition is not general with the sugar planters. The cane has given immense yield, and the beautiful weather prevailing during almost the entire fall of the year, enabled the farmers to harvest the crop at a minimum cost.

The sugar industry of the State during the past season has made rapid advancement. The industry has been spoken of as one of great waste, and the improvement has been mostly in the reduction of this waste. The addition of bounty from the United States Government does not bring sugar up to anything like former prices, yet it is believed if legislation unfavourable to the industry is avoided, planters can still make fair progress.

Cotton crop. The estimate is less than last year and is placed at 451,651 bales. The percentage per acre is better than last year, being about 203 lbs. per acre.

Corn crop. It is estimated that nearly 20,000,000 bushels of corn have been made, which is a little better than the crop of last year.

Sugar cane. A large estimate is placed on the sugar crop, all reports indicate that a very heavy yield has been received.

In addition to the usual crop questions, the following have been asked and are answered by numbers :—

Q. 1.—What fertilisers have been used in your parish this year? If any, give the kind, the quantity per acre, the method of applying same and result.

A.—Stern's phosphate raw bone fertiliser was used on corn in drill about 100 lbs. per acre, and the yield was at least 25 per cent. in favour where it was burned.

Cotton-seed meal, tankage, mixtures of meal and phosphates.

Cotton-seed meal for cotton, put 200 lbs. per acre ; results always good.

Cotton-seed meal and acid phosphate.

Caddo fertilisers 150 lbs. to 300 lbs. per acre.

Caddo fertilisers 100 lbs. applied to corn at first ploughing ; the same amount applied to cotton at planting.

Bone phosphate has been tried on rice with great success.

Cotton-seed and cotton-meal seed with success, about 1,000 lbs. of the former to the acre, and about 100 lbs. of the latter per acre.

Cotton-seed meal and phosphates about 200 lbs. per acre, with good results.

Cotton seed meal and acid phosphate mixed, 200 lbs. per acre.

Cotton-seed meal and bone dust.

Superphosphate and planters' fertiliser, result good on cotton, and good on corn, amount per acre about 200 lbs.

Cotton-seed meal, tankage, phosphates and other commercial fertilisers from 400 lbs. to 1,000 lbs. per acre, with good results.

Cotton-seed meal and acid phosphate bedded on or applied at second ploughing, gave good results.

Cotton-seed meal and stable manure, about 400 lbs. per acre, results satisfactory.

Cotton-seed meal in drill with good results.

Cotton-seed meal is generally used with success, most planters fertilise by planting cow peas.

Pea vines and cotton-seed meal successfully used.

Bone dust, raw bone, and superphosphate.

Guano from 2 lbs. to 3 lbs. per acre, results favourable.

Q. 2.—What new methods of culture have been tried, and with what success?

A.—Self-binders have been used in harvesting rice, and have proved satisfactory.

Cotton-seed and barn-yard manure.

Dearing cultivator used instead of plough.

Q. 3.—What improved implements have been tested for cultivation, harvesting, or machinery for manufacturing crops, &c.? If any, give them and the results.

A.—Many improvements have been put up, tramways, cart dumps, locomotives for handling cane, burners for bagasse, Gordon hollow blast bars; Sterling boilers, double effects, &c., with the result of increasing the output of sugar and reducing the fuel consumption.

Stohl cultivator, acme harrow, results good.

The gang plough was used by a few but not very satisfactorily.

Sulky ploughs are most used.

Q. 4.—What new variety of cotton has been tested this year, and with what success?

A.—The peterkin has been tried with good success.

Pelican has done well.

The Brandon has given favourable results, while the Egyptian has not been a success.

King's improved a success.

Brannon and southern hope are found to be the best.

Fruit's improved; the bulbs much larger and hand can pick more in a day.

Q. 5.—What variety of cotton gives the largest yield per acre, what the largest percentage of lint, and that which is thought best adapted to your climate?

A.—Pelican, herlong, and peerless. The pelican has yielded the best, giving from 34 per cent. to 36 per cent. of lint.

African the largest yield per acre.

Peterkin has given the best results.

Brannon gives the best yield.

Peterkin gives about 34 per cent. lint.

The king said to be the most prolific, but very short and staple.

Peterkin, herlong, peterson, African, all give good results.

Dixon gives most satisfaction, peterkin also does very well.

In some parts fruit's yielded more than others.

Petty gulf seed, hagerman, southern hope, fishbourne, and peterkin were all satisfactory.

Q. 6.—What new variety of sugar cane has been planted this year? If any, with what result?

A.—Ribbon and red cane.

Q. 7.—What variety most preferred on account of ratoons.

A.—Ribbon cane. That variety commonly called blue cane. The ribbon cane is preferred. Common purple preferred by some. Red ruban, purple and ribbon.

Q. 8.—What is your opinion regarding shaving of stubble, and does it cheapen cost of cultivation or advance its coming up and final yield? How does that shaved compare with that not shaved this dry season?

A.—Shaving the stubble lessens the labour of cultivation and secures a better stand. Cheapens cost of cultivation, comes up better and yields better.

The stubble that was shaved is better than what was not shaved.

Shaving is very good, saves time and labour.

The shaved stubble is more beneficial.

Comes up earlier and gives growth from bottom eyes.

Q. 9.—What is your opinion regarding cane trash? Should it be burned, or all ploughed under? If the former, would you prefer early or late burning?

A.—Late burning; cane trash should be ploughed under as soon as possible. Burn late in the spring. Either plough under deep or burn just before ploughing.

Prefer ploughing under cane trash.

Cane trash should be burned as soon as it is dry enough to burn.

Should also be burned as soon after cutting cane as possible.

Q. 10.—What has given the largest yield this year, that planted in the autumn, or that during the winter or spring?

A.—That planted in the autumn is answered by some parishes, but the majority claim that those planted in the spring give the largest yield.

Q. 11.—What new varieties of corn have been tested this year? If any, give name, results, &c.

A.—The Georgia red cob the favourite.

A corn by the name of McGuire has given remarkable results.

Creole corn is preferred in some districts.

Q. 12.—What variety of corn is mostly preferred, and reason therefor?

A.—Shoepeg and yellow Spanish stands drought best.

The yellow corn is more nourishing to animals and better adapted to this climate.

A corn called Mosby gives a great yield.

Flannagan resists better the attacks of insects.

Hickory King is a favourite on account of its being very early.

Q. 13.—Has any experiment been made regarding rice, in seed, preparation of ground, the time for irrigation, and methods of harvesting, &c. ?

A.—Land broke up in winter will yield larger crops.

Q. 14.—What new varieties of fruits, vegetables, &c., have been tested this year ? If any, what are they, and your opinion as to their usefulness ?

A.—Burke peach with splendid results, and the sugar beets make good hog food when cooked.

Celery with results.

Q. 15.—Has there been any extraordinary yield in any crop in your parish this year ? If so, give the means employed in securing such yield.

A.—The yield from sugar-cane has been very firm this season.

Q. 16.—Has any new breed of stock been introduced this year ?

A.—The Jersey red hog up to date has given satisfaction.

Trotting horses.

Q. 17.—What pasturage or range have you for stock ? Do you feed them in winter ? If so, on what do you principally feed ? How long do they require it, and if not fed, on what do they subsist during the winter ?

A.—Some of the stock are driven in the swamps during winter, where they do very well.

Those kept at home are fed on cotton seed and corn.

Milk cows are fed on cotton seed and corn meal, and the fields are open to the rest of the stock.

Old fields in summer, swamp cane in winter. We feed milk cows in winter only, and principally on cotton seed.

We have Bermuda, carpet and other native grasses in abundance, also corn, fodder, cotton seed, hulls, and meal. Potatoes, field peas, and sorghum for hogs, cattle are fed for about 3 months with cotton seed, with a little corn shelled in with the seed.

A good many cattle winter themselves on the switch cane in the creek bottoms, and the natural pastures afforded in the pine woods.

Q. 18.—What crop yields the largest amount of, and is best adapted for, winter feed at the least cost ? What for feeding green in summer ?

A.—Sorghum, potatoes, and turnips for winter feed, sorghum fed green in summer.

Bermuda for summer, and millet for winter.

Sweet potatoes for winter, oats for summer.

Cow peas and lespedeza cut tail millet for green feeding. Lespedeza and crab grass make the most hay ; sweet potatoes also furnish a good feed at a low cost.

Hay from the native grasses.

Q. 19.—What grass is most preferred for summer pasturage, and what for winter ?

A.—Bermuda for summer, and Texas blue grass for winter. Guisot and Bermuda grass preferred, also carpet grass. Pine woods grass for summer, hay and cotton seed for winter. White clover for winter, and native grass for summer.

Q. 20.—Has there prevailed diseases among any kind of stock in your parish this year? If so, describe each disease and remedies used, and with what success.

A.—Hogs have been affected with kidney worms, some die in a day with spasms, while others linger; they lie down most of the time, appear to be drawn up with pain, drink a great deal of water, and their urine is of a dark and muddy colour.

A disease supposed to be hog cholera has been very fatal among hogs, no remedies whatever have been used.

Influenza has been prevalent among horses.

Q. 21.—Have farmers purchased more or less farm supplies this year than last?

A.—Less farmers' supplies have been purchased.

Q. 22.—Are farmers generally in a better or worse condition than last year?

A.—It is generally believed that farmers are not so well off at this time this year as they were at this date last year, the reason of this is supposed to be on account of the low price of cotton and sugar.

Q. 23.—If the stock law has been adopted in your parish, state how the people are pleased with it?

A.—The general opinion is that the stock law would be a great advantage, and the people would be much pleased.

Q. 24.—Are there any obstacles to successful farming? If so, give the principal ones, and what remedies you would suggest.

A.—In some parts high water is a great obstacle. If the land can be protected from overflow any crop can be raised with almost a certainty.

The price of farm products being controlled by future dealers. Remedy: a law to abolish all future dealing.

Poor labour, also crevasse water are obstacles.

Another drawback is the disposition to raise too much cotton and too little of the necessaries of life.

Q. 25.—Give any information you may deem of value?

A.—Less taxation and the growth of products required for family use.

Report on the Tobacco Crops in the State of Louisiana for the Year 1893.

Results of the present year having fallen below those of 1892, both in quantity and quality of tobacco produced, it is but fair and proper to state the causes for the difference.

The seasons for 1892 were most favourable for tobacco-growing, while those of 1893 were most unfavourable. In common with Virginia, North Carolina, and other tobacco-growing sections, this

section suffered from a cold, wet spring, followed by excessive rains and high winds, rains continuing until June here, when an unprecedented drought set in, lasting until November. The result was low yields and inferior quality of tobacco, not only here but throughout the tobacco-growing sections.

Selection and preparation of seed beds.

In the latter part of January a gently sloping hillside, exposure to the south-east, was selected for the seed beds. The land was new and fairly rich. On the plats selected, brush, poles, and logs were piled and burned for several hours, until the entire space was well burned to a depth of ½ inch, thus destroying all obnoxious grasses and weed seeds, which otherwise would prevent the successful growth of young tobacco plants.

After the soil had cooled, all trash and coals were removed, the ashes remaining as a fertiliser. Grubbing hoes and rakes were then employed to completely mulch and pulverise the soil to a depth of 2 inches, thoroughly cleaning the ground of roots, &c., having care not to invert the sub-soil.

In the meantime a good application of well composted manure, in which the grass seeds had been killed, was thoroughly incorporated with the soil.

Sowing the seed.

For every 10 feet square, one tablespoonful of seed was united with three or four times as much ashes, to prevent too thick sowing, and sown once regularly over the bed, reserving enough seed to "cross-sow."

A light roller passed over the bed several times, covering and packing soil about the seed.

The beds were then trenched around to prevent washing and ward off surface water.

Protection by canvas.

12-inch planks were then placed around and "staked-down," strips nailed across 2 feet apart, and cheap canvas or cheese cloth, made to fit the framework, was tacked tightly on over the bed.

This covering is necessary, and therefore commended. It keeps the bed warmer, and hastens the growth of young plants. It protects from heavy rains and frosts. However, several days before the plants are to be transplanted the canvas may be removed, in order that the plants may be drawn from either side without getting on the bed with the feet.

Liquid manuring hastens the growing of the young plants. Leach well rotted fowl-house manure; dilute the leach, and sprinkle the beds at sundown.

Experiments in the field.

Variety tests of both bright leaf or chewing tobaccos and cigar leaf or smoking tobaccos.

Preparation of land and transplanting plants.

"A good preparation is half cultivation." In January the tobacco lands were deeply and thoroughly broken with turning ploughs. In April it was cross ploughed with "bull-tongues," harrowed, and rows marked off 3½ feet apart, indicating where the plant was to be dropped.

At the first rain after this preparation, which occurred on April 1, vigorous plants of three or four leaves were carefully drawn from the bed, placed in flat open baskets and carried to the field. Here they were carefully handled, and dropped at the

previously marked places along the row. A man follows with a suitable peg, and pushing it 2 or 3 inches in the soil, withdraws it, inserts the plant, and with dexterous movement of peg and knuckles of left hand presses the dirt gently but compactly about the roots.

Cultivation.

Early, rapid, and thorough cultivation is necessary for a good tobacco crop, with frequent stirring and mulching of the soil.

Every 10 or 12 days after transplanting, shallow planting with scooters and heel-scrapers, followed by hoes, was given.

The ploughs were so regulated as to mulch the soil 2 or 3 inches deep, while the hoes followed, working close about the stalks, removing grass, and more completely mulching the soil, making slight hills about the plant.

Topping, worming, and suckering.

When many plants had buttoned for seed, topping began, leaving, according to vigour of plant, from 9 to 20 leaves to the stalk.

The suckers appearing in the axils of the leaves after topping were carefully pulled off every week thereafter until the crop was finished. By persistently killing the hock moth that makes the green-horned worm the past year, we were not much troubled with worms during the present year.

Cotton-fly lamps were also used to good effect, and Paris green in very light applications ($\frac{1}{8}$ lb. per acre), was employed to kill the worms on tobacco.

If these agents be used the worms can be exterminated, otherwise hand-picking must be resorted to. But when it is considered that every moth is capable of laying about 200 eggs, and that at least two broods are certain during the season, and that 40,000 worms are possible to every moth of May, it is no wonder that the second brood sometimes appears in such countless hordes as to defy all efforts at destruction before the crop is ruined. Hence the great importance of destroying the first crop of moths and worms.

Conclusions.

The conclusions are that North Louisiana can produce large paying crops of the bright or yellow leaf type of tobacco on her loose sandy soils.

That her worn-out old pine fields can be reclaimed in profitable tobacco production of this type with fertilisers.

That her alluvial soils will produce very large crops of both cigar and tobacco bright leaf or white burley types, and that the quality will make it profitable farming.

That appropriate fertilising on the hill lands more than doubles the yield.

That potash in no form has greatly increased yields.

That nitrogen increases the yield largely, and that acid phosphate increases moderately.

That about 300 lbs. of cotton-seed meal mixed with 100 lbs. or 150 lbs. of acid phosphate is the best and most economical fertiliser.

That Hester, Ragsland's improved, long leaf gooch, conqueror, and Orinoco are the varieties and types to grow on these soils.

That home manufacturing and home markets are indispensable, and are necessary to establish tobacco farming.

TABLE showing Area under Cultivation and the Quantity Produced of the undermentioned Crops during the Year 1893.

Articles.		Area.	Quantity.
Cotton	Acres	1,109,647	..
	Per cent. of a bale per acre.. ..	..	40
	Bales	..	451,651
Sugar-cane	Acres	256,412	..
	Hogsheads of 1,000 lbs.	..	629,006
	Barrels of molasses 50 gallons each..	..	591,207
Corn	Acres	1,229,235	..
	Bushels per acre ..	..	17
	Bushels	..	19,951,952
Rice	Acres	192,300	..
	Lbs. per acre ..	..	544
	Lbs. of cleaned rice	..	104,642,987
Sweet potatoes	Acres	49,554	..
	Bushels per acre ..	..	57
	Bushels	..	2,792,905
Irish potatoes	Acres	2,468	..
	Bushels per acre ..	..	36
	Bushels	..	881,391
Oats	Acres	57,702	..
	Bushels per acre ..	..	14
	Bushels	..	768,386

Pensacola.

Referring to agriculture and phosphate mines, Mr. Vice-Consul Howe reports as follows:—

In writing upon agricultural matters here, it will be understood, as I have said before in these reports, that it is always my aim to keep as closely as possible to such things as I think likely to benefit our people in the British possessions, where the climates and soils come near to those of Florida. I also take the liberty sometimes in these reports to go outside of my immediate post in gathering such items which I deem may be of interest on this subject.

Aimed to give reports beneficial to British agriculturalists.

I have, from time to time in these reports, given a list of the various productions in fruits and vegetables of this semi-tropical climate; showing the very profitable industries arising therefrom to the people of Florida; and I have pointed out that the same industries and their results, or many of them, in my opinion were open to British agriculturalists in many parts of our vast dominions of similar climate, if they would turn to account with energy and business methods, the waste lands—some of which are better to cultivate and more generous in yield than those of Florida—there lying idle.

Profitable industries.

Open to British agriculturalists.

As regards the cultivation of fruit in Florida, I have before this especially referred to the large, the very large, business done in certain parts of Florida in the growth and export of oranges, and under this head I have pointed to the waste lands in the British West India Islands, which are even far better calculated in my opinion for the growth of oranges than those of Florida, considering the size and flavour of this fruit yielded there.

Large business in oranges.

Lands in British islands available.

The cultivation of the orange and the business in this fruit in Florida is done to a large extent with such business methods as ensure success generally to those engaged in the industry. On such lines only will profit follow the cultivation of this fruit.

With steam communication now directly open between the islands of the British West Indies and the northern ports of the United States, shipments of fruits and vegetables could be made with success from those places in the same way as from Florida to the northern markets I think.

Steam facilities.

I see by a recent publication that the orange growers of Florida have for a long time been considering the question of making a new outlet for the orange crops. They are, it is stated, looking to points across the Atlantic, and some growers have already sent shipments of this fruit to England and to markets on the Continent.

New outlet.

It is officially announced that the Florida Fruit Exchange has arranged to send large quantities of this season's crop to Great Britain. The Exchange, I am informed, has established an agency at Liverpool, which is said to be the most desirable distributing point for Florida, and where large quantities were sold during the last season.

Florida oranges to England.

Agency at Liverpool.

The fruit sent by the Exchange to Liverpool is forwarded viâ New York, and an inspection is there made before transferring it to the steam lines, in order that sound fruit alone should go forward. Special freight rates are obtained for these shipments. Forwarded viâ New York.

In my last year's report on agriculture, I referred to the rapid strides which were being made in the cultivation of the tobacco plant throughout Florida. I gave an account of a regular tobacco "fair" which had been held at Pensacola during the year 1892, and referred to the success which had attended the gathering, both as regards the quantities and the qualities of the exhibits. Tobacco.

The interest taken in this new, or much-revived agricultural industry in Florida, keeps on with unabated vigour; and, no doubt, the incomes of the people here will continue to be yearly increased by this money-making industry. Many of the white and black population of Florida are following up tobacco planting, and they are facilitated in this work, as much as possible, by the railroad companies in Florida, by almost free grants of land for the planting, and other concessions toward enlarging the business. Much tobacco is successfully cultivated immediately around Pensacola.

Here again, I may remark upon the advantages of the British West India Islands for the cultivation of tobacco for export, as well as fruits and vegetables, if the people there would only, as they are doing in Florida, go into the cultivation of this plant on business methods and principles. Advantages of British islands for growing tobacco.

Corner of a Tobacco Farm, near Lake City, on the Florida Central and Peninsular Railroad. (Taken from "Florida Life.")

In view of the many letters which I receive from time to time from persons in England, asking my opinion about their coming to Florida, and requesting my advice as to their chances here, particularly in an agricultural point of view, I think that I can do no better than reproduce here an article on this subject recently published by an eminent gentleman of Florida, whose official standing, added to his practical knowledge of what he writes about, will show that entire confidence may be placed in his statement. Letters from England asking information about Florida.

The article, as follows, from "Florida Life," is by Senator Reynolds, of Lakeland, Florida. "He represents his district in the Florida senate, and is the presiding officer of that august body."

Article on Florida quoted.

"I have often thought that if any one thing more than another contributed to retard the progress and development of Florida, it is the disposition of many to overdo nearly everything they undertake. This way of thinking is not of recent origin either. I remember as far back as fifteen years ago, or more, listening to real estate agents representing to prospective settlers the possibilities of Florida climate and Florida soil, which, if true, would have transformed our fair State into a veritable paradise 'ere this. The result was that hundreds of persons, honestly believing those representations, came to the State and purchased land of any and all kinds. Some planted oranges, lemons, and lime trees in the virgin forest, then returned to their homes in other States, expecting to come again in a few years and find their trees flourishing as they had seen the wild trees growing in their native hammocks. Others purchased sand soaks and sand scrubs, upon which to make their groves, and after cultivating them for a number of years realized, all too truly, that their time, labour, and money were but lost. Others still, purchased land suitable in every respect for the suitable growing of the citrus family, but believing the representations made to them as to the cost of time, labour, and money necessary to bring a grove into a successful bearing, undertook to do as many times as much as their means would enable them to do, and consequently could but make a miserable failure in the end.

"Again, other speculators laid out town sites within a few miles of each other on every line of railroad as it was built in the State, as well as along the banks of the streams both navigable and unnavigable; also at such points along several of hundred miles of the sea coast, both on the Gulf and the Atlantic, as are accessible to even only the smallest boats, and then proceeded straightway to advertise to the known world, that each one of these prospective towns was certain to be the coming city of the State, thus inducing hundreds more to believe that the matter of city building could not be overdone, and causing the too credulous to invest their money in town lots, paying therefor oftentimes fabulous prices in hard-earned money never to be seen again, as too truly evidenced by the many white posts that can be seen from the cars while travelling over any of our railroads; posts intended first to mark out the town lots, but now standing, in truth, to mark the graves of the hopes of the all too foolish.

"Again, when the truly great discovery of the rich and valuable phosphate deposits of the State were made, we find this same class of speculators given to the over-doing of things; in a miraculously short space of time swarming in and about the commercial fertilizer marts, not only of the United States, but also in England, Germany, France, and still other countries, thus, by their numbers, as well as by their over-representation of the quantity of both phosphate

rock and pebble they had for sale, causing both manufacturers and consumers to believe that the world was about to be deluged with an over supply of the stuff; that Florida was a solid bed of phosphate, and that all a purchaser in Europe had to do was to order one or a dozen cargoes, and it would at once be shoveled aboard of a ship and sent across the Atlantic without a day's delay. The inevitable result was that prices dropped so low that many lost all they had invested in this promising business before they had time to make even a fair start, while others, still holding up, are not receiving anything like the price they should for so valuable an article of commerce.

"We find, as a legitimate result of thus overdoing almost everything in our State, hundreds of people scattered throughout the civilized world who once came to Florida and stayed just long enough to find out that things were not always just as they had been represented, circulating all manner of tales, to the great injury of the State, with just enough semblance of truth in their statements to keep others from coming, who, if better informed as to the true conditions prevailing here, would be able to thrive as they can nowhere else.

"Practical results have proven in hundreds of instances that if a man will, in the first place, select land adapted to the purpose, and plant either orange, lemon, or lime trees, pineapple, grapes, or many other products which could be mentioned, and then give to them that intelligent and industrious care and pains necessary to success in anything, that he will, in a given period, receive a larger reward for his labour, time, and money than he can possibly hope to receive under the same conditions from the cultivation of the soil in any of the other States of the Union.

"We also have in Florida well located cities and towns that are prosperous and growing, and that will continue to prosper and grow throughout the ages to come, and which are inviting fields for both capital and labour, where each will receive handsome returns for investments made. And while our phosphate deposits are rich and valuable, and, in quantity, sufficient to supply the demands of the world for years yet to come, still it will require expenditure of millions of money, an untold amount of labour and valuable time to bring it forth from the bowels of the earth, and place it in proper condition for either the manufacturer or consumer to utilize it, thus making phosphate to Florida what gold is to California, and furnishing in its development permanent employment for thousands of men at fair wages.

"When we represent Florida's resources let us do it truthfully; they are great enough and grand enough, just as nature has made them, and man in his efforts to colour them can only detract therefrom."

Real estate travelling agents.

In most of the letters referred to above as having been received by me, I have been told that real estate travelling agents in England, representing, or claiming to represent, companies or persons in Florida, give such glowing accounts of the land to would be emigrants, that the temptation is very great to them

to take the leap into the unknown domains, and venture here, with their families, and their little all.

Caution.

I never, in my replies to the enquiries made of me, dispute the assertions given as made by the agents spoken of. But my advice always is, to take no positive step before seeing for themselves. The article given above by Senator Reynolds bears me out, I think, in my replies to the enquiring parties above alluded to, and to all others who may yet require information on the subject.

Independently, however, of the remarks last above given relative to the practicability or not of settling in Florida, it still remains a fact that this is a fine portion of this great country.

Florida State Agricultural College.

Recently appointed trustees of the Florida State Agricultural College (located at Lake City, Florida) have inaugurated several measures in the management of the college, which, it is thought, will greatly increase its value to the people of Florida. The first of these measures is the admission of women to all departments of the college.

Open to women.

It appears that hitherto it was a question whether it was legally or morally right to exclude one half of the youth of Florida from participation in the benefits of the ample endowments enjoyed by the State College. The present trustees think it is not right, and accordingly the doors of the institution will be open to both sexes on equal terms.

Phosphate business.

In my commercial report for 1890 I gave an account of the phosphate business that was just about opening in Florida. I quoted remarks upon the strange manner in which this hitherto unknown, but future great article of trade, came upon the people of Florida, as well as upon the outside world.

One of the leading publications of Florida—the "Times Union," of Jacksonville—then writing on the subject, said: "To tell one half of the wonderful phosphate story of Florida would require several pages of the trade edition. As it goes to press, the whole State of Florida is stirred from centre to circumference over the wealth which this discovery promises. The business is not only in its infancy, it may be said to have hardly been born as yet. To present anything like an exhaustive review of it at present would be impossible."

The business in Florida phosphate, although it may be somewhat overdone, nevertheless must have opened much of an export and domestic trade to the portions of Florida where it is mined; and this export trade gives much business to tonnage. Many British steamers load at Tampa with the phosphate rock for ports abroad.

A Thirty-ton Phosphate Boulder, at Albion, on the Florida Central and Peninsular Railroad. (Taken from "Florida Life.")

Mobile.

Report on Agriculture for the Year 1893.

Agriculture. The agricultural interests of this district for the past year have shown much improvement, and although the year has been marked by financial disaster through the greater portion of the country, Alabama has passed the ordeal almost unscathed, chiefly owing to the success attending her agricultural industries. For many years past there has not been such a change from a single crop raising to diversified farming, and the effect is seen in the better conditions of the farmer, even although prices have been lower than for years. Crops were over an average, and owing to their variety the farmer was able to take advantage of what would bring the highest market prices. Corn, potatoes both sweet and Irish, oats, cabbages, peas, beans, okra, tomatoes, and cucumbers, and the several kinds of berries, pears, peaches, pecans, grapes, as well as several other products, gave good yields, and those who have settled lately in the south, both from the north and west of this country as well as from foreign countries, have done extremely well, especially those who understand farming. This country certainly offers an excellent field for such, as the climate is so favourable many kinds of crops will continue growing the whole year. In this immediate section frosts are almost unknown and the land is ready at any time to receive seed which it will bring to maturity.

Truck farming. Truck farming and fruit culture are extending rapidly, the yield the past year being nearly double of any former one, and the amounts of profits from these were large, even although a part of the season prices were low. Everything was shipped in good condition, and a trade is being built up which must continue, even if the amount shipped each year is more. New markets are opening up, as purchasers know they can depend upon the quality,

as there is a thorough inspection of every package before shipment. Those who come here to settle have thus a market for their products which has a credit away from home. At this time no section of this country offers such favourable advantages to the immigrant as does the south, and this for various reasons. Here there is an even climate, and the winter does not consume what the summer produces. Lands may be purchased at very low prices, from 4s. per acre upwards, and that, too, in localities where there are good transportation facilities, and where the land will produce almost anything one may wish. Taxes are low, while the cost of manufactured goods are in favour of the purchaser, making it a cheap country in which to live, while good prices are obtained for whatever the land produces, and owing to the seasons being early, these products are placed in the principal commercial markets before the icy king unloosens his grasp from our more northern fellow countrymen. Transportation rates are low, so that this trade may be fostered, and it has grown to mammoth proportions.

Stock. Owing to the superabundance of grasses, live stock does well, and there has been a satisfactory addition to this industry the past year, and it will only be a short time before the south will become an exporter of cattle, sheep and hogs, instead of an importer, as she has been too long. She has everything in her favour to bring this to a successful issue, and as each new energetic farmer comes in an extra impetus is given in the right direction. Too few have been engaged in this direction, as cotton had taken up the whole attention of the original planters, but with the present influx of new settlers, who know nothing about cotton, and would raise it only as one of their diversified crops, stock will receive its just share of attention.

Cotton. The cotton crop in many parts of this district was below the average, owing to boll worms and unfavourable weather, but the crop on the whole is in advance of the short crop of last season; yet the whole south does not yield an amount equal to the demand of the world, even with the surplus of 1891. Undoubtedly manufacturing of cotton had been overdone, which accounts for the low prices even now, and of which there are few hopes of an increase. But the planter has made more clean cash from his present short crop and at the low prices offered than he has done during some of the best years, as he has raised his own supplies for which he had formerly to mortgage his crop before any planting of his crop was done. The present low price has given the death blow to advances from the cotton broker, as the planter has realized the ease with which he may engage in diversified farming on part of his farm while his cotton acreage is kept almost intact. He also finds he produces quite an amount of fertilizer which he formerly did not, and that his live stock brings him more than the same acreage had done many years while in cotton.

Land value. Lands are advancing in prices, the prices now being fully 25 per cent. more than they were last year, and each year this will go on increasing as the land is settled up. During 1893 more

TEMPERATURE and Precipitation at Mobile, Alabama, Station, with Averages since t

Year.	January.						February.						March.					
	Temperature.				Rainfall.		Temperature.				Rainfall.		Temperature.				Rainfall.	
	Mean.	Maximum and Date.	Minimum and Date, 23 Years.	Average, 23 Years.	Average Inches.	Average, 23 Years.	Mean.	Maximum and Date, 23 Years.	Minimum and Date, 23 Years.	Average, 23 Years.	Average Inches.	Average, 23 Years.	Mean.	Maximum and Date, 23 Years.	Minimum and Date, 23 Years.	Average, 23 Years.	Average Inches.	Average, 23 Years.
1871	50	78 degrees on January 28, 1882.	11 degrees on January 9, 1886, the coldest day in 23 years.	50 degrees. Greatest velocity of wind, 36 miles on January 3, 1878, January 18, 1878, and January 16, 1889.	6·50	Average, 5·16 inches.	58	78 degrees, February 16, 1883.	19 degrees, February 5, 1886. Greatest velocity of wind, 60 miles, February 6, 1881.	Average temperature, 55 degrees.	5·13	Average, 4·52 inches.	61	85 degrees, March 29, 1879.	25 degrees, March 21, 1890. Wind velocity, 42 miles, March 9, 1877.	Average temperature, 59 degrees.	9·76	Average, 7·21 inches.
1872	45				3·69		52				8·00		55				12·76	
1873	46				4·16		56				3·15		57				3·86	
1874	53				2·48		57				2·72		63				10·57	
1875	50				5·79		51				7·15		60				8·39	
1876	57				3·14		55				4·32		56				8·01	
1877	50				6·30		53				1·40		57				5·94	
1878	48				4·57		52				3·40		64				4·33	
1879	49				0·78		52				1·99		62				5·94	
1880	59				1·18		56				5·73		64				9·41	
1881	48				7·62		53				8·60		57				10·41	
1882	58				6·74		59				4·54		65				5·13	
1883	53				8·80		60				3·63		58				4·21	
1884	44				7 40		57				5·01		62				11·53	
1885	48				11·95		48				2·85		54				6 36	
1886	44				6·12		50				2 15		57				14·62	
1887	48				2 90		62				6·62		59				3·65	
1888	52				3 20		56				10·33		58				7·24	
1889	50				5·07		49				4 64		56				3·48	
1890	62				0 60		61				2·95		57				0·68	
1891	49				6 50		59				4·54		59				6·96	
1892	47				9·97		57				2·09		56				8·52	
1893	46				3·17		58				3·65		57				3·97	

Year.	April.						May.						June.				
	Temperature.				Rainfall.		Temperature.				Rainfall.		Temperature.				
	Mean.	Maximum and Date, 23 Years.	Minimum and Date, 23 Years.	Average, 23 Years.	Average Inches.	Average, 23 Years.	Mean.	Maximum and Date, 23 Years.	Minimum and Date, 23 Years.	Average, 23 Years.	Average Inches.	Average, 23 Years.	Mean.	Maximum and Date, 23 Years.	Minimum and Date, 23 Years.	Average, 23 Years.	Average Inches.
1871	68	90 degrees, April 29, 1881.	32 degrees, April 2, 1881. Greatest velocity of wind, 60 miles, April 6, 1889.	Average temperature, 67 degrees.	2 93	Average, 4·95 inches.	73	98 degrees, May 31, 1873.	46 degrees, May 31, 1889. Greatest velocity of wind, 48 miles, May 23, 1879.	Average temperature, 74 degrees.	6·18	Average, 4·41 inches.	81	100 degrees, June 28, 1877; June 22, 1881; and June 20, 21, and 23, 1882.	50 degrees, June 1, 1889.	80 degrees. Greatest velocity of wind, 36 miles, June 8, 1889, and June 17, 1890.	
1872	69				4·35		76				3·78		81				
1873	66				1·88		74				11·47		79				
1874	64				10·92		73				1·23		80				
1875	63				7·51		76				1·46		81				
1876	66				3 88		75				4·32		81				
1877	66				8·40		73				1·68		82				
1878	70				4·09		76				4·90		81				
1879	66				6·42		75				3·56		80				
1880	69				2·99		75				5·62		80				
1881	65				9·21		77				1 44		83				
1882	70				9·92		72				6·78		81				
1883	69				7·25		73				8·51		81				
1884	66				5·54		75				8·48		78				
1885	66				5·24		72				3·27		79				
1886	64				5·86		72				1 27		78				
1887	66				1·03		74				3·06		77				
1888	68				3·99		72				7·30		76				
1889	66				1·65		70				2 98		77				
1890	68				1·98		73				5·50		80				
1891	66				1·65		72				0·67		80				
1892	66				3·10		72				1·49		79				
1893	69				3·72		74				6 64		79				

* Records burned. The Weather Service has been greatly improved since it was transferred from the Army Department to the Department of Agriculture, to which it properly belongs, and no station has made greater improvements than the one at Mobile, as Mr. James A. Barry, Observer, Weather Bureau, h

(1776—to face p. 17.)

Station was Established in 1871, also the Greatest Velocity of Wind, each Month.

nfall.	July.						August.						September.						October.						November.						December.					
	Temperature.				Rainfall.		Temperature.				Rainfall.		Temperature.				Rainfall.		Temperature.				Rainfall.		Temperature.				Rainfall.		Temperature.				Rainfall.	
Average, 23 Years.	Mean.	Maximum and Date, 23 Years.	Minimum and Date, 23 Years.	Average, 23 Years.	Average Inches.	Average, 23 Years.	Mean.	Maximum and Date, 23 Years.	Minimum and Date, 23 Years.	Average, 23 Years.	Average Inches.	Average, 23 Years.	Mean.	Maximum and Date, 23 Years.	Minimum and Date, 23 Years.	Average, 23 Years.	Average Inches.	Average, 23 Years.	Mean.	Maximum and Date, 23 Years.	Minimum and Date, 23 Years.	Average, 23 Years.	Average Inches.	Average, 23 Years.	Mean.	Maximum and Date, 23 Years.	Minimum and Date, 23 Years.	Average, 23 Years.	Average Inches.	Average, 23 Years.	Mean.	Maximum and Date, 23 Years.	Minimum and Date, 22 Years.	Average, 23 Years.	Average Inches.	Average, 23 Years.
	82				4·24		83				3·70		75				3·95		69				5·33		58				6·68		52				1·36	
	81				13·37		81				1·69		78				2·11		66				2·77		54				5·65		48				3·70	
	82				8·75		80				10·35		76				8·07		65				1·85		57				3·23		54				2·97	
	81	101 degrees, July 8, 1831.			10·21		84				3·79		78				2·54		69				..		60				2·04		54				4·17	
	84				4·00		78				7·09		75				8·52		63				2·32		62				5·06		58				3·01	
	83		64 degrees, July 6, 1882. Greatest velocity of wind, 36 miles, July 10, 1887; July 24, 1888, and July 30, 1892.		5·38		80				11·53		76				1·76		64				0·37		55				5·36		44				7·18	
	85				3·74		82				4·69		77				12·68		68				6·15		56				4·70		54				5·99	
	84				2·98		82				9·95		77				3·86		68				4·84		58				6·31		47				7·64	
	81				11·17		78				10·54		76				1·33		69				5·15		61				4·72		56				3·38	
	80				4·92		80				4·75		75				7·04		67				7·32		.. *				.. *		49				3·71	
	83				2·77		82				15·22		79				11·71		74				3·23		59				7·36		57				9·15	
	79				9·52		79				8·76		76				4·05		71				8·29		58				2·67		48				5·84	
	84				3·31		82				5·88		78				0·96		73				0·84		60				2·57		56				3·11	
	80				4·96		79				1·26		78				1·78		72				5·36		56				4·12		54				5·10	
	80				3·81		79				6·07		77				9·25		63				1·19		56				4·83		50				5·00	
	79				6·59		80				3·55		78				2·69		67				0·13		56				3·36		49				1·97	
	80				4·31		80				4·31		77				6·21		66				2·45		59				0·44		51				7·21	
	80				5·36		78				14·35		73				3·04		65				2·48		57				2·46		49				2·83	
	81				9·55		79				2·80		77				9·97		66				0·08		56				6·78		61				0·52	
	80				9·22		78				4·79		77				3·61		61				0·32		61				0·32		54				1·55	
	80				14·43		80				3·50		77				4·05		65				0·20		57				7·60		53				6·81	
	79				7·50		80				13·47		75				4·93		69				3·03		58				1·93		52				7·06	
	82				2·84		81				7·33		78				11·53		66				8·56		58				3·54		56				1·84	
Average, 6·03 inches.		101 degrees, July 8, 1831.	64 degrees, July 6, 1882. Greatest velocity of wind, 36 miles, July 10, 1887; July 24, 1888, and July 30, 1892.	Average temperature, 81 degrees.	Average, 6·65 inches.		100 degrees, August 13, 1874.		57 degrees, August 25, 1891. Greatest velocity of wind, 56 miles, August 20, 1888.	Average temperature, 80 degrees.	Average, 6·93 inches.		96 degrees, September 4, 1881.		52 degrees, September 30, 1888. Greatest velocity of wind, 43 miles, September 27, 1887.	Average temperature, 77 degrees.	Average, 5·33 inches.		94 degrees, October 12, 1884.		34 degrees, October 29 and October 30, 1873, and October 31, 1887. Highest velocity of wind in 23 years, 72 miles, October 2, 1893.	Average temperature, 70 degrees.	Average, 3·28 inches.		83 degrees, November 3, 1888.		25 degrees, November 21, 1887. Greatest velocity of wind 36 miles, November 27, 1887, and November 12, 1889.	Average temperature, 58 degrees	Average, 4·17 inches.		79 degrees, December 22, 1884.		20 degrees, December 27, 1892. Greatest velocity of wind, December 16, 1888, and December 31, 1892.	Average temperature, 52 degrees.		

n it such a position, it will soon be equipped with automatic and electrical recording instruments. The Signal Station at Fort Morgan, at the entrance to Mobile Bay, is connected with the service here, and notice of storms or atmospheric changes is signalled to shipping arriving or departing from the lower bay.

actual settlers have come to this district than for many previous ones, and those who have come are so well satisfied that they are sending for their friends, and before 1894 closes, thousands of acres will be taken possession of, and the country progress as it has never done since the struggle which began in 1861. The south certainly offers more to the immigrant than any other part of the country, as she is rich in everything which most tends to the prosperity of any country. Here agricultural lands are superior; she has boundless forests of the best woods required by the manufacturer; she produces three-quarters of the cotton grown, and that of a superior quality; her coal and iron mines are certainly rich, while her fisheries could be made as productive as that of any country, but which are now neglected almost entirely. In addition to all these she has a climate excelled by that of no other country, where sunstroke may be said to be unknown, and where one may be in the field every day in the year in so far as heat and cold will prevent, and where the precipitation is sufficient to cause the soil to produce most abundantly.

The following table of temperature and rainfall for the past year, as well as the average for the past twenty-three years, is a proof of the evenness of the climate, and is taken from the reports of the weather bureau located in this city.

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1894.

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DIPLOMATIC AND CONSULAR REPORTS ON TRADE AND FINANCE.

UNITED STATES.

REPORT FOR THE YEARS 1892–93

ON THE

TRADE OF PHILADELPHIA AND DISTRICT.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1078.

Presented to both Houses of Parliament by Command of Her Majesty, JUNE, 1894.

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UNITED STATES.

PHILADELPHIA.

Consul Clipperton to the Earl of Kimberley.

My Lord, *Philadelphia, May* 10, 1894.

I BEG leave to enclose a Report on the Trade, Commerce, and Manufactures of this Consular District during the years 1892–93.

I have, &c.

(Signed) ROBT. CHAS. CLIPPERTON.

Report on the Trade, Commerce, and Manufactures of the Consular District of Philadelphia for the Years 1892–93.

ABSTRACT of Contents.

	Page
Introduction	2
Labour	2
Labour in Ohio	2
Labour in Michigan	5
Shipping and navigation	5
Shipbuilding	10
Fish culture	12
Oysters	13
Trade and commerce	13
Grain	13
Imports	15
Exports	18
Immigration	21
Minerals	24
Anthracite and bituminous coal	26
Petroleum	30
Tin-plate	31
Iron and steel	31
Textiles	36
Tanneries	39
Strikes	39
Failures	42
Banks	46

ABSTRACT of Contents—continued.

	Page
Trusts	46
Insurance	47
Railways	47
Street railways	56
Accidents	57
Philadelphia	59
Other towns	61
Criminal	63
Liquor licenses	63
Legislation	64

Introduction.

The four States, Pennsylvania, Indiana, Ohio, and Michigan, composing this consular district, have experienced two entirely different conditions during the two years just past. In 1892 the prosperity of 1891 continued and even increased in many industries, but in 1893 a wave of depression prevailed over the entire country, a practical cessation of business activity took place, and a feeling of uncertainty, amounting occasionally to panic, alarmed the entire community. The exact causes of this change are difficult to determine, and have been variously assigned, but the lamentable condition of affairs, involving privation and almost starvation in whole districts, appears to have passed away, and a general revival is at length being gradually realised.

Labour.

The condition of labour has necessarily fluctuated with the foregoing changes, and even in those industries which have lately resumed their activity a very general reduction of wages, averaging perhaps 10 per cent., has occurred. The labour organisations do not appear to have gained very much in strength, and in some instances have experienced no small amount of trouble, arising frequently from inability to exercise sufficient control over all branches, internal and sometimes personal dissensions, and the large numbers of unemployed persons willing to seize any opportunity of work, even when occupying the places of persons who had gone out on strike.

Labour in Ohio.

In his annual report for 1893 the State Labour Commissioner for Ohio gives considerable information on farm statistics, which he considers has hitherto been a very much neglected field of investigation, although fully as important as manufacturing, mining, and other such employment. He includes in his report the wages paid in most industries, and it therefore contains information of great value to intending immigrants, and throws considerable light upon the trade and commerce of that State. The investigation covers 1,500,000 acres, or 7½ per cent. of the total acreage of the State. In order to make the work as purely agricultural as possible proximity to large cities was avoided. Schedules containing lists of questions were mailed to the farmers, and 15,000 were filled out and returned to the bureau. Following is a brief synopsis of the various phases of the subject:—

Size of farms, acreage, valuation, and taxation:—The total number of farms included in the investigation is 8,671, divided as follows: Farms under 50 acres, 717; farms between 50 acres and 100 acres, 1,773; farms between 100 acres and 200 acres, 3,988; farms over 200 acres, 2,193. The cash valuation of the whole number of farms is 12,557,648*l.* This does not take into account stock or other personal property. Deducting the value of farming implements and machinery, 326,063*l.*, the cash value of the realty is shown to be 12,231,584*l.* The average assessed valuation per acre is shown to be 4*l.* 9*s.* 3*d.*, and the average cash valuation 8*l.* 18*s.* 11*d.* The average amount of taxes per acre is 1*s.* 4*d.* The net earnings are 7*s.* 4*d.* per acre, and the net income plus the tax is 8*s.* 8*d.* per acre. The tax on realty is shown from these deductions to be 15·3 per cent. of the amount of savings or net income.

The total mortgage indebtedness reported for the 1,407,548 acres covered by the report is 957,132*l.*, or an average of 2*l.* 6*s.* 8*d.* per acre. Purposes for which mortgages were created: Purchase money, including incumbrance incurred, with which to buy other land, 495,232*l.*, or 72·6 per cent. of the whole; buildings, improvements, and repairs, 51,459*l.*, or 7·5 per cent. of the whole; purchase of agricultural implements, machinery, and stock, 11,211*l.*, or 1·6 per cent. of the whole; and the rest for other purposes.

Average wages paid throughout the State: For winter month, with board, 2*l.* 5*s.* 10*d.*; same, summer, 3*l.* 4*s.*; for winter month, without board, 3*l.* 15*s.*; same, summer, 4*l.* 13*s.* 7*d.*; per day with board, 3*s.* 9½*d.*; same without board, 4*s.* 10*d.*; per day, during harvest, with board, 5*s.*; same without board, 6*s.* 5½*d.*; average wages paid female help, with board, per week, 7*s.* 4*d.* The total amount paid for hired help covering 1,292,955 acres is 214,709*l.*, an average of 3*s.* 5½*d.* per acre; the average of amount paid for hired help per acre of land under cultivation is 4*s.* 5*d.* The Secretary of State's report for 1892 gives the total value of acreage of the State under cultivation, including pasturage land, at 3,225,181*l.*

It is shown that the average amount expended for groceries is 15*l.* 14*s.* 5*d.* per family, and 3*l.* 7*s.* 3½*d.* per individual member; shoes and clothing, 17*l.* 9*s.* 7*d.* per family; furniture and household goods, 4*l.* 18*s.* 3*d.* per family, and 18*s.* 7*d.* per member. Returns covering 959,780 acres show the amount of savings or net earnings to be 339,598*l.*, an average of 7*s.* 4*d.* per acre. The amount of savings per acre of land under cultivation is given at 9*s.* 5*d.* The capital actually invested yielded as savings or net earnings the sum of 498,279*l.*, or 4·28 per cent. This allows nothing whatever for the labour of the farmer and his family, except a living.

The total number of families reported in the investigations is 9,659, with an average of 5·35 persons to each family, making a total of 51,717 persons, the number of children being 35,177. In this the number of boys over 18 years of age is 9,594, of whom 3,758, 39·17 per cent., are engaged in occupations other than farming. The capital invested in farming machinery is given at

193,429*l.*, covering 1,585,451 acres, or an average of 2*s.* 5*d.* per acre. The average value of farming machinery per acre under cultivation is 3*s.* 1*d.* Estimated, the total valuation of farming machinery in the State is 2,515,645*l.*

The number of females employed and attached to the concerns coming within the direct scrutiny of the department's representative was about 8,000. Of the various groups into which this army of female wage-earners is separated, the manufactured textile industry takes first place in point of numbers employed; the average weekly earnings running between 1*l.* 3*s.* in Cincinnati, where 1,613 are employed, and 17*s.* in Springfield, where 182 are employed. Cleveland, 1,008 employed, shows the highest yearly earnings, 51*l.* 9*s.* 11*d.*, and Springfield the lowest 30*l.* 12*s.*, on an average of 46 weeks and 36 weeks per year respectively. The average earnings per year for the entire State are 47*l.* 17*s.* 5½*d.* Laundrying gives employment to 300 girls in Cleveland, and 272 in Cincinnati. In the other five cities combined 221 are engaged in the business. The highest average weekly wages are paid in Cincinnati, the figure standing at 1*l.* 5*s.*, and the average for the whole State is 1*l.* 3*s.* Convict laundrying is largely carried on in the Cincinnati workhouse, the contractor paying 1*s.* per day for each woman. The burial case industry, investigated in Springfield and Zanesville, furnishes work 49 weeks in the year, the girls earning on an average 55*l.* 0*s.* 6*d.* Girls employed at pretzel making and at wrapping and packing cakes and candies average 37*l.* 1*s.* 8*d.* per year for 50 weeks' work. Cigar factory operatives work 46 weeks, and earn 30*l.* 5*s.* 11*d.* The cordage industry which is an important one, and includes the making of hammocks, employs in Akron, Xenia and Zanesville 227 girls, with the factories running about one-third their usual force. With an average of 37 weeks per year the girls earn 32*l.* 10*s.* 2*d.* Cereal mills in Akron and Zanesville yield the operatives in a year of 39 weeks an average of 29*l.* 14*s.* 10*d.* per year. Female help employed in making drills in cutlery factories have work 32 weeks in the year and earn 1*l.* 4*s.* 9*d.* per week. Hotel help, as investigated in the five smaller cities, pays an average of 2*l.* 1*s.* 2*d.* per month, exclusive of board and lodging, the hours of work running from 11 to 14 hours per day. In an Akron lithographing concern, where 227 girls are at work, the average earnings are 48*l.* Springfield employs girls as moulders in malleable ironworks. They work by the piece and in 40 weeks earn 32*l.* The manufacture of overalls pays an average of 8*s.* 10*d.* per week for the time actually employed, and merchant tailoring 16*s.* 9*d.* Printing and binding, which includes type-setting, pays 1*l.* 5*s.* 8*d.* on an average in one city, which is the highest of any single industry. In the powder and fuse works of Xenia the girls earn 1*l.* 11*s.* 4*d.* per week, the highest for any business for time actually employed, but the season only lasts 16 weeks in the year. Rag sorting, which attracts the most inferior class of female help, pays from 4*s.* 2*d.* to 12*s.* 6*d.* per week, and is a repulsive, disagreeable employment. In the five cities outside of Cincinnati and Cleveland, telephone girls average 16*s.* 6*d.* per week for the time actually employed.

Tomato canners, in a season of from 10 to 16 weeks, earn 9*l.* 16*s.* 5*d.* Pottery, paper and paper bags, restaurants, reed and rattan, rubber goods, shoes, soap, shirts, saddlery, hardware, silver plating, tile, tents and awnings, toy marbles, woollen goods and watches are other industries in which female help is employed, in the latter industry in one concern the regular force of girls is over 500. The number of women and girls furnished employment by the concerns investigated in the different cities is: — Cincinnati, 2,165; Cleveland, 1,162; Canton, 1,104; Zanesville, 1,018; Akron, 989; Springfield, 742; Xenia, 375. Average yearly earnings: Cleveland, 50*l.*; Cincinnati, 48*l.*; Akron, 38*l.*; Zanesville, 33*l.*; Canton, 29*l.*; Springfield, 28*l.* 10*s.*; Xenia, 28*l.* The free public employment offices have been largely patronised. The following figures are from the five offices combined: situations wanted, 26,854; help wanted, 17,229; situations secured, 13,201. The help wanted amounted to 64·16 per cent. of the situations wanted; the positions secured to 76·62 of the help wanted, and to 49·16 per cent. of the situations wanted.

Labour in Michigan.

The State Labour Bureau of Michigan in its annual report gives indexes of the depressed condition of business during the year 1893. It states that at the close of the year of the 2,066 factories in the State which were inspected nearly one-fifth were idle, including some of the largest and most important; and only a little more than half running full time. The average reduction in wages was 9·5 per cent. Taking the 5 months from September 1, 1893, to January 31, 1894, it was estimated that in all the factories of the State the working men had lost 1,763,060 working days of 10 hours each. Calculating the average pay for a day's work at 6*s.* 3*d.*, the money lost to the Michigan working men in 5 months was about 550,000*l.*, or at the rate of over 2.000,000*l.* a year. The number of persons unemployed in the mines of that State during 1893 was very great, as operations were practically suspended in that important industry, and charitable relief, until March, 1894, became necessary in order to save thousands of persons from starvation.

Shipping and Navigation.

The shipping at the port of Philadelphia for the years 1892–93 is recorded as follows.

The entrances of British ships, cargo and ballast, were:—

	1892.	1893.	1891.
	Tons.	Tons.	Tons.
Cargo	834,827	737,211	..
Ballast	445,039	374,680	..
Total	1,279,866	1,111,891	989,793

The returns furnished by the United States custom-house, for the years 1892–93, for the shipping of all nations at this port are as follows:—

1892.—ENTERED.

Nationality.	With Cargo.		In Ballast.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Sail—						
Austrian	1	711	...	..	1	711
British	122	62,380	24	35,074	146	97,463
Dutch	2	1,764	...	..	2	1,764
French	2	1,244	3	3,687	5	4,931
German	2	1,922	1	2,[illegible]	3	4,[illegible]
Italian	45	26,948	9	5,889	54	32,837
Norwegian	30	28,080	17	17,520	47	3[illegible]
Portuguese	6	2,385	3	899	9	3,284
Russian	2	1,196	...	...	2	1,196
Swedish	2	1,689	..	...	2	1,689
Total	214	126,748	57	65,771	271	186,525
Steam—						
Belgian	10	22,208	8	10,408	18	32,616
British	534	861,080	184	297,843	718	1,[illegible]
Danish	...	..	8	11,172	8	11,172
Dutch	...	...	11	21,160	11	21,160
French	...	...	7	7,763	7	7,763
German	10	16,337	23	48,847	33	[illegible]
Norwegian	136	69,667	4	5,776	140	75,443
Spanish	8	12,998	1	1,369	9	14,[illegible]
Swedish	2	1,022	..	...	2	1,022
Total	700	928,302	246	399,528	946	1,323,830
Grand total ...	...	...	...	...	946	1,[illegible]

Showing a total of 864 British vessels, to which may be added 72 British vessels, entering this port from other United States ports, as shown by the consular registers, total 936

1893.—ENTERED.

Nationality.	With Cargo.		In Ballast.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Sail—						
Austrian	1	925	...	...	1	925
British	109	84,948	28	47,588	137	132,536
Danish	2	1,554	...	...	2	1,554
Dutch	2	2,915	1	1,498	3	4,413
French	2	1,244	4	4,442	6	5,686
German	8	9,235	2	3,105	10	12,340
Italian	38	24,409	3	2,133	41	26,542
Norwegian	30	21,251	22	25,208	52	46,459
Portuguese	6	2 349	5	2,867	11	5,216
Russian	...	...	2	2,124	2	2,124
Spanish	1	635	...	...	1	635
Swedish	3	1,719	...	...	3	1,719
Total	202	151,184	67	88,965	269	240,149
Steam—						
Belgian	7	15,190	5	6,305	12	21,495
British	428	674,972	109	204,232	537	879,204
Danish	13	4,903	1	1,614	14	6,517
Dutch	...	...	12	23,203	12	23,203
French	1	1,109	6	7,554	7	8,663
German	15	30,322	25	47,309	40	77,631
Norwegian	71	37,400	1	496	72	37,896
Portuguese	1	1,644	...	...	1	1,644
Russian	1	612	...	...	1	612
Spanish	3	5,758	8	11,878	11	17,636
Swedish	15	8,464	...	...	15	8,464
Venezuelan	...	...	1	68	1	68
Total	555	780,374	168	302,659	723	1,083,033
Grand total	...	...	...	...	992	1,323,182

Showing a total of 674 British vessels, to which may be added 76 British vessels, entering this port from other United States ports, as shown by the consular registers, total 750.

1892.—CLEARED.

Nationality.	With Cargo.		In Ballast.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Sail—						
Austrian	1	711	...	...	1	711
Brazilian	1	338	...	...	1	338
British	123	94,706	15	6,623	138	101,329
Dutch	1	266	...	...	1	266
French	5	4,931	...	...	5	4,931
German	7	8,762	...	...	7	8,762
Italian	78	50,509	...	...	78	50,509
Norwegian	36	30,808	...	...	36	30,808
Portuguese	8	2,913	...	...	8	2,913
Russian	2	1,136	...	...	2	1,136
Swedish	2	1,526	...	...	2	1,526
Total	264	196,606	15	6,623	279	203,229
Steam—						
Austrian	1	1,269	...	...	1	1,269
Belgian	17	30,446	...	...	17	30,446
British	574	900,156	32	31,287	606	931,443
Danish	8	11,172	...	...	8	11,172
Dutch	11	21,150	...	...	11	21,150
French	7	7,763	...	...	7	7,763
German	34	61,772	...	...	34	61,742
Norwegian	26	19,033	102	51,191	128	70,224
Spanish	4	5,892	1	457	5	6,349
Swedish	...	...	1	511	1	511
Total	682	1,058,613	136	83,446	818	1,142,069
Grand total	...	...	...	...	1,097	1,345,298

Showing a total of 744 British vessels, to which may be added 209 British vessels leaving this port for other United States ports, as shown by the consular registers, total 953.

1892.—Cleared.

Nationality.	With Cargo.		In Ballast.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Sail—						
Austrian	4	2,829	...	...	4	2,829
British	122	128,[illegible]	12	5,884	134	134,[illegible]
Danish	1	884	...	...	1	884
Dutch	4	5,944	...	...	4	[illegible]
French	8	8,412	...	...	8	8,412
German	12	17,[illegible]	...	...	12	[illegible]
Italian	66	43,[illegible]	...	...	66	43,[illegible]
Norwegian	55	40,[illegible]	...	...	55	40,[illegible]
Portuguese... ...	10	4,765	...	...	10	4,765
Russian	2	2,124	...	...	2	2,124
Spanish	1	635	...	...	1	635
Swedish	2	1,387	...	...	2	1,387
Total	287	265,882	12	5,884	299	271,766
Steam—						
Belgian	13	23,665	...	...	13	23,665
British	356	624,[illegible]	56	49,528	412	673,[illegible]
Danish	1	1,614	12	4,925	13	6,539
Dutch	11	21,[illegible]	...	...	11	21,[illegible]
French	7	8,[illegible]	...	...	7	8,[illegible]
German	32	58,[illegible]	...	...	32	58,[illegible]
Norwegian	9	4,678	59	31,268	68	35,946
Russian	1	612	...	...	1	612
Spanish	8	11,[illegible]	...	...	8	11,[illegible]
Swedish	2	1,916	9	4,519	11	6,435
Total	440	752,892	136	89,840	576	842,[illegible]
Grand total ...	...	...	...	...	875	1,114,[illegible]

Showing a total of 546 British vessels, to which may be added 205 British vessels, leaving the port for other United States ports, as shown by the consular registers, total 751.

1892.—Entered.

Nationality.	With Cargo.		In Ballast.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Sail—						
United States ...	345	180,884	9	1,[illegible]	354	[illegible]
Steam—						
United States ..	44	82,[illegible]	3	2,217	47	84,[illegible]
Total	...	...	...	...	401	[illegible]

Cleared.

Nationality.	With Cargo.		In Ballast.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Sail—						
United States ..	283	164,[illegible]	1	3[illegible]	284	164,[illegible]
Steam—						
United States ..	39	79,[illegible]	10	6,[illegible]	49	85,[illegible]
Total	...	...	...	...	[illegible]	[illegible]

1893.—ENTERED.

Nationality.	With Cargo.		In Ballast.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Sail—						
United States ...	245	123,933	7	7,300	252	131,233
Steam—						
United States ...	40	87,721	2	413	42	88,134
Total	...	...	...	...	294	219,367

CLEARED.

Nationality.	With Cargo.		In Ballast.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Sail—						
United States ...	209	126,232	8	3,257	217	129,489
Steam—						
United States ...	36	84,399	4	1,709	40	86,107
Total	...	...	...	...	257	215,596

1892.

	Steamers.	Ships.	Barks.	Brigs.	Schooners.	Total.
Entered—						
American vessels from foreign ports	48	10	81	33	242	414
Foreign vessels from foreign ports	956	34	191	37	24	1,242
Coastwise ...	1,472	12	49	5	2,513	4,051
Total ...	2,476	56	321	75	2,779	5,707
Cleared—						
American vessels for foreign ports	50	5	55	16	225	351
Foreign vessels for foreign ports	840	35	188	31	25	1,119
Coastwise ...	1,551	14	70	30	2,548	4,213
Total ...	2,441	54	313	77	2,798	5,683

The year just ended will pass into history as a fierce and destructive one at sea, and Philadelphia seems to have more than shared her part of the disasters and consequent loss of life. Marine underwriters claim to have suffered greater losses than in any previous year. The total number of lives lost at sea on Philadelphian vessels, chiefly schooners, is estimated at 151, and the value of property destroyed at 275,510*l.*

Some vessels arriving from foreign ports have been detained, and compelled to enter security for large amounts, for failure to comply with the Act of Congress of February 15, 1893, which required the production of United States consular duplicate bills of health obtained at the point of departure. The maximum

penalty for not obtaining duplicate bills of health is 5,000 dol. (1,000*l.*), and the United States marshal can seize the vessel until the bill is paid. It is evident from cases in court that the fines will be strictly imposed, and ignorance of the law or confidence in foreign brokers will not hereafter be accepted as an excuse.

Among the passenger and freight lines regularly trading between Philadelphia and other ports the principal ones are the following:—Allan Line; Halifax, St. John, and Glasgow-American Line; Liverpool, Boston, and Philadelphia Line; Boston, Clyde Line; New York, Earn Line; West Indies, Ericsson Line; Baltimore, Hart Steamship Company, Fruit; West Indies, Munson Line; Mexico, Red Star Line; Antwerp, North Atlantic Trident Line; London and Rotterdam, Ocean Steamship Company; Savannah, Providence and Fall River Line.

Shipbuilding. A gradually increasing desire is noticeable to improve the position of the United States both as to its navy and its merchant marine. The repeal of the navigation laws is suggested in behalf of the latter, as they are considered by some to be detrimental to progress, being but a survival of the navigation laws of England, which were repealed nearly half a century ago. The ocean carrying trade of this country has steadily declined, until now it has fallen below that of some of the minor commercial nations of Europe. The transfer of the "New York" and "Paris" to an American register is now being followed by the construction here of similar ships, according to the terms of contract.

Considerable additions are gradually being made to what had a few years ago become a practically obsolete navy; and although faults of construction, top-heaviness, weakness of armour plates, and such like, are occasionally rumoured to exist in the new ships, the very fact of their construction means progress. This is evident when it is recollected that in 1883, when the first naval contract was signed, there was not in the United States "a single mill that had ever made plates and shapes of the quality required by the Government specifications; no foundry had ever made steel castings of that standard; no forge capable of making steel shafts, or the tubes, jackets, and hoops required for the motive power of the ships, or for the built-up, breech-loading rifled cannon of large calibre, and no plant to even entertain a proposition for the heavy armour plates necessary for the construction of fighting ships," all such having been previously imported; whereas now it is claimed that there are yards and plants in this country "which can produce, in any quantity and of the highest quality, any structure in steel, or iron, or brass, or any other metal, that can be produced anywhere," all of which have been created or developed during the past seven years. The greatest of these achievements are due to the enterprise, invention, and skill of Pennsylvanians, assisted greatly by the immigration of British mechanics, especially in Philadelphia and Pittsburg.

During the year 1893 the merchant marine was augmented in June by the laying, in Philadelphia, of the first keel plates of the two 10,600 ton vessels for the International Navigation Company.

They will be 511 feet 8 inches long, breadth of beam 63 feet, depth 40 feet. They are said to be the smallest of the five ships that will be built here for the company.

During the years 1892 and 1893 three vessels were launched from Cramp's ship-building yards in Philadelphia for the navy, viz.:—

	Tons.	Horse-Power.
U.S.S. "New York"	8,150	18,000
U.S.S. "Newark"	4,070	8,870
U.S.S. "Columbia"	7,350	21,000

Each of which during its trial trip earned a premium for its builders for speed exceeding the specifications.

In addition to the foregoing output of completed vessels, work was carried forward in the same yards upon the following vessels during the years mentioned:—

	Tons.	Horse-Power.
U.S.S. "Indiana"	10,400	10,000
U.S.S. "Massachusetts"	10,400	10,000
U.S.S. "Minneapolis"	7,350	22,000
U.S.S. "Iowa"	11,300	12,000
U.S.S. "Brooklyn"	9,150	18,000
Total	48,600	72,000

Measured by the British rule for computing progressive tonnage and indicated horse-power in the construction of ships, the progress on the foregoing ships during the two years ranged from 90 per cent. in the case of the "Indiana" to 20 per cent. in the cases of the "Iowa" and "Brooklyn."

The "New York" in her trial trip, during a double run over a course measuring 41⅔ knots, made a record of 21 knots per hour, earning a premium of 10,000*l.* for each quarter knot above the quarter specified by contract. The "Columbia's" speed was announced officially as 22·81 knots per hour, earning even a larger premium. The contract for the "Indiana" calls for a speed of 15 knots, with 3,000*l.* premium for every quarter knot in excess; the price to be 604,000*l.*; and her outside armour 18 inches thick. These ship-building yards, although extensive, are being constantly enlarged. There are usually nearly 6,000 persons on the pay-rolls, and during the industrial depression of the past year the employment of so many persons in the mechanical district of the city has been appreciably felt.

Since writing the foregoing, at the annual meeting of the International Navigation Company (American line) in May, 1894, it was announced for publication at the office of the company in New York that only routine business was transacted other than

the re-election of the board of directors. It was stated officially, however, that a mortgage of 6,000,000 dol. (1,200,000*l.*) has been filed at the Registrar's office and the custom-house on all the property of the International Navigation Company, of New Jersey, on behalf of the Fidelity Trust and Safe Deposit Company. This property includes the steamers "New York" and "Paris,' now in the service between New York and Southampton; the steamers "St. Louis" and "St. Paul," now under construction by the Cramps, and one of which may be launched in August; the "Friesland," "Westernland," "Nordland," "Waesland," "Pennland," "Rhynland," "Belgenland," and "Switzerland," of the Red Star Line; the "Illinois," "Indiana," "Ohio," and "Pennsylvania," of the Philadelphia-Antwerp service; and the leasehold interest in the new piers of the American line at the foot of Fulton Street, New York. The money obtained on the mortgage, it is said, is to be used in the completion of the "St. Louis" and "St. Paul," and also to pay for the "Southwark" and "Kensington," constructed on the Clyde, the former being already in service between Philadelphia and Liverpool, and the latter is soon to have a trial trip.

Fish culture.

Fish culture is very successfully practised in the United States to the great benefit of all concerned. During the year 1892 the total distribution by the United States Fish Commission, of eggs fry, and yearlings numbered 306,580,432. The most extensive operations are in shad. Of this fish there were distributed 69,000,000 fry, including 1,000,000 yearlings, and nearly 3,000,000 eggs. Of the shad fry over 15,000,000 were distributed in Maryland waters, 9,469,000 in those of Pennsylvania, and 735,000 in New Jersey. Pennsylvania received 11,230 carp yearlings; 4,500 tench yearlings; 3,000,000 Atlantic salmon yearlings; 6,000 rainbow trout yearlings; 900 von Behr trout yearlings; 1,625 brook trout yearlings; 7,600 lake trout yearlings; 12,500,000 white fish eggs (to the State Commission); 15,000,000 pike perch eggs (to the State Commission); 160 black bass yearlings; 2,000 rock bass yearlings, and others.

Such a supply should materially assist in repopulating the waters with edible fish. Pennsylvania has three great river systems, the tributaries and main streams of which used to swarm with fish of many excellent varieties; but, until recent years, ruthless destruction of all kinds was permitted, and the rivers had become devastated. Pennsylvania now has a Governor and a Fish Commission who are fortunately both doing their best to protect the fish and re-stock the waters; as was evidenced last year when the Governor vetoed a measure, passed by the Legislature, permitting the restoration of fish baskets. But another measure was permitted to become law, which gives the members of assembly full control over the distribution of fish fry. This, it is feared, may impair the usefulness of the Fish Commission.

The salt waters unfortunately have not been protected by restrictive laws, and food fish destruction goes on without interruption. It is now being urged that it is the "duty of the people's

representatives in Congress to enact laws that will place the menhaden and other coast fisheries under such restrictions as will prevent the edible fishes from being so largely and wastefully diminished in numbers, as they have been for years past and still are."

Oysters. The oyster dredging business has suffered severely during the year 1893; partly from the severe storms of August and September, but more especially from the increasing prevalence in Delaware Bay and the tributary streams of the oyster "borer," a pest about the size of a small strawberry, which fastens itself to the shell. It appears to have a peculiar aptitude for attaching itself to the finest oysters, and is most commonly found in the best beds. When the hole of the "borer" is made near the centre of the shell, the oyster is attacked in its vital parts and dies in 3 or 4 days after the hole is first made. The "borer" was practically unknown in these waters 10 years ago, but now sometimes over 90 per cent. of the fruit of a dredging trip is rendered valueless owing to its ravages.

Trade and Commerce.

The grain trade of Philadelphia is no longer a source of congratulation to the port. The Chief Inspector's report for the year 1893 shows the total receipts and shipments of grain to be as follows:—Wheat, 4,642,714 bushels against 12,020,805 bushels in 1892; corn, 5,331,012 bushels against 22,271,406 bushels in 1892; and oats, 5,091,125 bushels against 5,213,154 bushels in 1892; while the exports of 1893 are wheat, 5,657,398 bushels against 9,819,384 bushels in 1892; corn, 3,985,406 bushels against 19,438,704 bushels in 1892. Receipts of barley were 627,200 bushels against 956,400 bushels in 1892. The flour business of the port makes a better showing, the receipts being 3,823,535 barrels against 3,457,514 barrels in 1892; while the exports show a slight falling off, being only 1,376,434 barrels in 1893 against 1,869,621 barrels in 1892. The report remarked that the foregoing figures were disapppointing, even with due allowance being made for the exceptional all-round depression.

Philadelphia has by no means retained its proportion of the export trade as the following table of annual exports of wheat, corn and flour from the Atlantic seaboard demonstrates:—

COMPARATIVE Table of Annual Exports of Wheat, Corn, and Flour from the Atlantic Seaboard during the Years 1893-91.

	1893.		1892.		1891.	
	Wheat and Corn	Flour in Wheat Equivalent	Wheat and Corn.	Flour in Wheat Equivalent.	Wheat and Corn	Flour in Wheat Equivalent
	Bushels.	Bushels.	Bushels.	Bushels.	Bushels.	Bushels.
Philadelphia	9,589,143	6,193,953	29,448,614	8,296,412	9,659,186	5,203,539
Baltimore	29,263,643	14,991,183	35,657,466	16,477,304	20,170,526	12,166,717
New York	59,849,971	27,148,964	63,555,319	27,154,170	53,457,821	18,577,620
Montreal	14,302,857	..	10,417,224	4,662,842	8,482,836	3,579,534
Portland	1,074,754	250,605	887,759	315,855	709,707	139,689
Boston	10,516,446	8,349,620	9,186,400	9,498,240	6,143,193	7,014,929
Newport News	4,322,458	3,795,917	3,749,922	4,196,786	2,496,284	3,886,479
New Orleans	19,875,819	539,451	21,588,121	1,023,444	12,248,369	234,068

Various reasons are ascribed for this lamentable condition of affairs; and it is alleged that the grain trade, like many other commercial interests of Philadelphia, is handicapped by the practical dependence of the city upon a single great trunk line railroad. The bankrupt Reading system seems not now in a position to successfully compete, and the Baltimore and Ohio Railroad, which is essentially a grain carrying road, is not competitive, the centre of its activities being Baltimore. By virtue of geographical position, capital, and special facilities, Philadelphia should occupy a leading place, but every northern Atlantic port controls a larger share of this business than does Philadelphia. It is also alleged that the ocean freight rates and facilities between Philadelphia and European ports are not so favourable as the existing rates and facilities at New York and Baltimore; and it is likewise said that certain terminal charges are exacted in Philadelphia which are not exacted from the grain merchants of New York, and which are apparently only employed at Baltimore to assist in concealing the differential rates there offered.

Imports.

The imports of Philadelphia during the year 1892, tabulated in brief, were as follows:—

TABLE showing the Values of Goods Imported (by Countries) into the Port of Philadelphia, Pa., in American and Foreign vessels during the Year ending December 31, 1892.

Countries	Free.	Dutiable	American	Foreign.	Total
	Dollars	Dollars	Dollars	Dollars.	Dollars
Argentine Republic ...	116,727	[illegible]	45,135	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Brazil	1,454,556	52	272,550	1,182,058	1,454,608
Costa Rica	[illegible]	...	...	[illegible]	[illegible]
Cuba	238,812	38,966	74,807	[illegible]	[illegible]
Chili	[illegible]	[illegible]	...	[illegible]	[illegible]
United States of Colombia	83,608	35	19,382	[illegible]	[illegible]
Ecuador	[illegible]	74	...	[illegible]	[illegible]
Guatemala	[illegible]	...	12,593	[illegible]	[illegible]
Dutch West Indies ...	[illegible]	83	...	[illegible]	[illegible]
Hayti	248,408	1,880,896	224,989	1,804,315	2,111,304
French West Indies ...	...	29	...	29	29
French possessions in Africa	182,364	147,502	37,286	[illegible]	[illegible]
Germany	[illegible]	2,745,[illegible]	229,202	[illegible]	[illegible]
Greece	...	66,014	...	[illegible]	[illegible]
Hayti	129,402	...	62,620	66,782	129,402
Hawaiian Islands ...	24	...	24	...	24
Italy	592,166	676,230	1,098	1,267,298	1,268,396
Japan	[illegible]	12,735	...	[illegible]	[illegible]
Liberia	1,524	...	...	1,524	1,524
Mexico	218,886	1,[illegible]26	5,670	[illegible]	[illegible]
Netherlands	[illegible]	169,[illegible]	26,014	[illegible]	[illegible]
Dutch West Indies ...	[illegible]	1,628	...	[illegible]	[illegible]
Dutch Guiana ...	192,455	...	...	[illegible]	[illegible]
Dutch East Indies ...	1,292,169	28	...	1,292,197	1,292,197
Peru	...	35	...	35	35
Portugal	59,586	12,119	...	71,705	71,705
Madeira Islands ...	...	156	...	156	156
Russia on the Baltic Sea	276,623	136,462	300	412,785	413,085
Russia on the Black Sea	[illegible]	17,241	9,794	[illegible]	[illegible]
San Domingo	[illegible]	...	[illegible]	[illegible]	[illegible]
Spain	[illegible]	408,146	[illegible]	[illegible]	[illegible]
Cuba	19,[illegible]	742,180	9,[illegible]	11,[illegible]	[illegible]
Porto Rico	[illegible]	252	[illegible]	[illegible]	[illegible]
Philippine Islands ...	1,[illegible]	...	[illegible]	[illegible]	[illegible]
Sweden and Norway ...	[illegible]	133,681	...	[illegible]	[illegible]
Switzerland	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Turkey in Europe ...	[illegible]	244,796	[illegible]	[illegible]	[illegible]
Turkey in Asia ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Turkey in Africa (Egypt)	198,932	324,674	97,135	426,471	523,606
Turkey in Africa (Tripoli)	111,874	4,386	[illegible]	[illegible]	[illegible]
England	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Scotland	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Ireland	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Nova Scotia	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Ontario	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Newfoundland ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
British West Indies ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
British Guiana ...	2,307,740	[illegible]	[illegible]	[illegible]	[illegible]
British East Indies ...	1,009,137	82,087	5,183	1,086,041	1,091,224
Hong-Kong	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
British possessions in Australasia	9,349	3,209	...	12,558	12,558
British possessions in Africa	547	428,954	...	429,501	429,501
Uruguay	94,215	1,101	...	96,316	96,316
Arabia	42,239	...	7,729	34,510	42,239
Morocco	34,337	...	...	34,337	34,337
	8,172	...	...	8,172	8,172
Total	42,206,825	21,068,956	14,514,821	48,762,960	63,277,781

The imports of Philadelphia during the year 1893, tabulated in brief, were as follows:—

Countries.	Free.	Dutiable.	American.	Foreign.	Total.
	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.
Austria	81,464	249,569	4,654	326,379	331,033
Madeira Islands ...	265	263	265	263	528
Belgium	210,441	340,374	170,196	380,619	550,815
Denmark	2,716	1,231	...	3,947	3,947
France	465,275	1,532,680	188,555	1,809,400	1,997,955
Germany	4,987,417	2,410,347	312,392	7,085,372	7,397,764
Greece	4,343	17,324	...	21,667	21,667
Greenland	125,475	...	56,641	68,834	125,475
Italy	467,946	602,731	13,889	1,056,788	1,070,677
Netherlands	100,630	136,816	40,007	197,439	237,446
Portugal ...	142,494	32,195	17,952	156,737	174,689
Russia on the Baltic Sea	457,267	175,881	3,267	629,881	633,148
Russia on the Black Sea	150,155	...	...	150,155	150,155
Spain	181,045	193,827	3,837	371,035	374,872
Sweden and Norway	13,250	108,156	3,674	117,732	121,406
Switzerland	5,495	374,133	56,168	323,460	379,628
Turkey in Europe ...	198,831	102,898	22,090	279,639	301,729
England	2,654,617	9,004,827	1,511,902	10,147,542	11,659,444
Scotland	100,770	1,006,151	44,379	1,062,542	1,106,921
Ireland	12,913	274,408	56,750	230,571	287,321
Bermuda	452	6,254	302	6,403	6,705
Nova Scotia and Prince Edward Island	45,803	21,539	22,356	44,986	67,342
Quebec and Ontario ...	13,858	10,175	...	24,033	24,033
British Colombia ...	...	17,371	...	17,371	17,371
Newfoundland ...	46,385	8,729	...	55,114	55,114
Costa Rica	...	10	...	10	10
Guatemala	170	...	...	170	170
Mexico	129,701	214	13,859	116,046	129,915
British West Indies ...	3,189,589	21,017	724,425	2,486,181	3,210,606
Dutch West Indies ...	825	...	...	825	825
Hayti	132,362	...	73,498	58,864	132,362
Santo Domingo ...	32,048	...	...	32,048	32,048
Cuba	15,779,020	678,648	4,304,899	12,152,769	16,457,668
Puerto Rico	288,200	1,559	130,054	159,705	289,759
Argentine Republic ...	123,641	...	28,979	94,662	123,641
Brazil	1,206,551	42	122,249	1,084,344	1,206,593
Chile	424,303	...	58,487	365,816	424,303
Colombia	38,548	...	18,273	20,275	38,548
British Guiana ...	1,608,455	...	766,145	842,310	1,608,455
Dutch Guiana ...	39,868	...	...	39,868	39,868
French Guiana ...	4,050	...	4,050	...	4,050
Uruguay	13,542	...	...	13,542	13,542
Venezuela	100	...	...	100	100
China	227,299	16,413	...	243,712	243,712
British East Indies ...	732,409	224,395	24,445	933,359	957,804
Dutch East Indies ...	2,377,037	...	4,513	2,372,624	2,377,037
Hong-Kong	5,949	3,410	1,427	7,732	9,359
Japan	21,113	9,449	838	29,724	30,562
Turkey in Asia ...	228,420	232,506	109,462	351,164	460,626
Arabia	1,177	...	...	1,177	1,177
British possessions in Australasia	261	217,899	...	218,160	218,160
Philippine Islands ...	3,515,941	...	107,115	3,408,826	3,515,941
British possessions in Africa	20,811	23	4,251	16,583	20,834
French possessions in Africa	95,825	33,449	21,113	108,161	129,274
Turkey in Africa (Egypt)	73,603	1,679	22,037	53,245	75,282
Morocco	20,770	...	...	20,770	20,770
Total	40,801,895	18,068,291	9,069,305	49,800,881	58,870,186

The value of imports at the port of Philadelphia during years 1892–93, by months, were as follows:—

Months.	Value.	
	1892.	1893.
	Dollars.	Dollars.
January	3,931,716	4,593,640
February..	4,337,613	5,348,556
March	5,165,890	5,913,969
April	4,338,676	5,825,727
May	4,798,726	6,161,182
June	4,843,721	5,914,903
July	7,149,168	4,139,236
August	5,636,278	4,360,588
September	5,371,216	5,252,888
October	6,121,189	3,449,247
November	3,747,591	4,288,730
December	4,335,997	3,628,270
Total	63,277,781	58,870,186

The totals in sterling at 5 dol. to the 1*l.*, equal for 1892, 12,255,556*l.*; and for 1893, 11,774,037*l.* For 1891 the value was 12,487,644*l.*

Exports.

The exports from Philadelphia in 1892 amounted to 12,054,805*l.*, an increase of 3,485,660*l.* over those of 1891. Of this amount 10,876,211*l.* were carried in foreign vessels, and only 1,178,594*l.*, or one-tenth in United States vessels. The countries to which they were sent are reported to be :—

Country.	Value.
	Dollars.
Austria	167,169
Belgium	3,277,202
Brazil	538,735
Colombia	58,066
Denmark	1,577,148
Danish West Indies	92,656
France	4,155,950
French West Indies	60,897
French Possessions, Africa	66,199
Germany	3,933,607
Greece	138,184
Italy	1,251,925
Japan	953,892
Mexico	171,865
Netherlands	2,702,463
Dutch East Indies	32,511
Portugal	248,630
Spain	941,847
Cuba	1,700,404
Puerto Rico	28,112
Russia	274,267
Sweden and Norway	185,702
England	30,180,093
Scotland	3,986,057
Ireland	3,052,261
British India	254,191
British West Indies	109,645
British Guiana	44,014
New Brunswick	31,254
Newfoundland	15,462
Ontario	24,018
Turkey in Europe	10,098
Venezuela	2,200
Uruguay	7,200
Total	60,274,024

The exports from Philadelphia in 1893 amounted to 8,683,391*l.*, a considerable decrease from 1892, but a slight increase over 1891. Of this amount 7,335,903*l.* were carried in foreign vessels, and 1,347,488*l.* in United States vessels; a better proportion for the United States than in 1892. The countries to which they were sent are reported to be:—

Country.	Value.
	Dollars.
Austria	133,009
Belgium	2,874,590
Brazil	1,064,598
Madeira Islands	11,853
Denmark	456,553
France	2,941,820
Germany	1,891,025
Greece	81,444
Italy	1,170,246
Netherlands	1,099,544
Portugal	282,906
Spain	488,718
Sweden and Norway	102,366
England	22,855,957
Scotland	3,518,125
Ireland	376,051
Mexico	213,241
Bermuda	1,403
Nova Scotia, New Brunswick, &c.	32,341
Quebec	18,578
Newfoundland	50,770
British West Indies	104,006
Danish West Indies	71,535
Dutch West Indies	4,437
French West Indies	40,274
Hayti	2,192
Santo Domingo	3,222
Cuba	1,148,420
Puerto Rico	16,058
Colombia	11,373
British Guiana	2,640
Venezuela	18,575
British India	1,276,882
Japan	1,052,198
Total	43,416,955

RETURN of Exports by months from the Port of Philadelphia, Pa., to Foreign Countries during the Years 1892–93.

Month.	Value.	
	1892.	1893.
	Dollars.	Dollars.
January	5,697,758	2,887,262
February	5,402,638	3,840,152
March	4,795,196	4,029,215
April	6,519,115	3,386,295
May	5,594,787	3,696,596
June	4,705,102	3,975,499
July	4,379,796	3,864,569
August	4,347,668	5,165,502
September	4,913,624	3,352,440
October	5,295,406	3,296,389
November	4,464,692	3,008,562
December	5,005,522	2,909,484
Total	60,274,024	43,416,955

Among the items of these exports from Philadelphia the values of the principal ones are estimated as follows :—

Articles.	Value.	
	1892.	1893.
	£	£
Wheat flour	1,818,712	1,351,495
Wheat	1,708,121	831,543
Maize (Indian corn)	2,017,170	396,121
Refined petroleum	1,587,531	1,577,744
Crude petroleum	666,697	602,936
Cattle, horses, &c.	636,928	314,709
Bacon	431,032	655,359
Tobacco	390,648	323,980
Cotton (unmanufactured).. ..	168,063	283,841

Most of these articles retain their relative positions of previous years; locomotives, however, the value of which in 1891 was 293,326*l.*, fell in 1892 to 74,298*l.*, the number being 34; but increased again in 1893 to 129,865*l.*, the number being 62. The export of hay steadily increases, the gain in 1893 over 1892 being 40 per cent. The value of art works increased over 50 per cent.; bark, and extracts of, decreased 50 per cent.; carriages, horse cars, &c., decreased about 50 per cent.; but cars, passenger and freight for railroads, increased about 65 per cent. More than 16,000*l.* of salmon, tinned, was exported in 1893, none in 1892. Leather decreased about 50 per cent.; beef about 50 per cent.; and molasses about 60 per cent.

Immigration.

During the fiscal year ended June 30, 1893, there arrived at all the ports in the United States 440,793 immigrants, of which number 1,063 were debarred for special causes; in addition to which latter number 577 were returned to the countries whence they came, having become public charges within 1 year after arriving in the United States. During the preceding fiscal year 581,827 immigrants arrived, 2,164 were debarred for special causes and 637 were returned for the aforesaid cause. The decrease in immigration was greatest from the following countries, Russia 40,791; Hungary 12,732; Poland 24,162; and Bohemia 2,428; whilst Italy shows an increase of 10,514. The decrease of arrivals is attributed largely to the enforcement of precautions against cholera; and the decrease of persons returned as public charges, to the restrictive measures embodied in the Act passed March 3, 1893, which went into operation about May 12 of that year. Considerable trouble has been caused from time to time by the non-English speaking aliens residing in this country, and sentiment hostile to their immigration appears growing; especially

in the mine and coke regions, where they occasionally become very turbulent and riotous. But in their behalf it must be borne in mind that they have come to take the place of those who could not live upon the wages paid, and that they themselves earn but very little. Their employment in mines, it is urged, is dangerous owing to their ignorance and carelessness, thereby endangering the lives of themselves and their fellow workmen, and causing damage to property; at periods moreover of general depression when thousands of persons are out of work, a general inclination is manifest to give labour preferably to citizens of the United States.

There were 29,163 immigrants who arrived in Philadelphia during the year ended June 30, 1893; of which number 18,031 were males, and 11,132 females; their ages were, under 15 years, 6,142; 15 years and under 40 years, 20,201; 40 years and over, 2,820. Of these immigrants 25 were debarred as paupers, 2 as contract labourers, and 51 were returned within 1 year after landing, total 78 returned. There were none returned as idiots, insane, diseased or convicts; 76 of them could not write, 2,421 of them could neither read nor write; 819 persons over 20 years of age brought 20*l.* each or over, and 12,117 brought less than 20*l.* each.

The nativity of the immigrants is officially reported as follows:—

Country.	Number.
England	4,209
Ireland	4,155
Scotland	332
Wales	315
Total	9,011
Germany	6,245
Russia	2,802
Poland	2,077
Hungary	1,965
Sweden	1,833
Austria	1,263
Belgium	988
Norway	738
Netherlands	476
Denmark	321
Italy	256
France	138
Finland	132
Switzerland	94
Bohemia	73
Turkey	35
Greece	33
Spain	23
Armenia	4
Australia	1
All other countries	655
Total	29,163

Their destination is officially stated to have been:—

Destination.	Number.
Pennsylvania	11,992
Ohio	1,239
Michigan	593
Indiana	290
Total	14,119
New York	4,801
Illinois	2,945
Wisconsin	1,627
New Jersey	988
Minnesota	816
Massachusetts	691
Iowa	584
Maryland	335
Missouri	320
Connecticut	249

and not more than 200 to any one other State.

Their occupations are reported as follows :—

Occupation.	Number.
Architects	1
Brewers	45
Butchers	229
Barbers	42
Bakers..	207
Blacksmiths	159
Bartenders	19
Bricklayers	44
Carpenters	366
Cabinet makers	37
Cigar makers..	99
Cooks	55
Coopers	37
Farmers	1,860
Florists	4
Gardeners	91
Hatters	54
Iron moulders	156
Labourers	5,356
Locksmiths	97
Laundrymen	2
Masons	140
Miners	1,045
Machinists	110
Millers	52
Musicians	41
Painters	126
Peddlers	15
Plasterers	7
Porters	8
Potters	21
Printers	26
Saddlers	29
Shoemakers	331
Spinners	40
Tailors..	769
Tanners	38
Tin-plate workers	..
Tinsmiths	45
Wagon makers	28
Weavers	269
Waiters	41
All other occupations	6,654
No occupation, including women and children	10,368
Total	29,163

The receipts of the immigrant fund at Philadelphia from July 1, 1892, to June 30, 1893, were 2,984*l.*; the expenses 1,929*l.*; and the balance on hand on July 1, 1893, was 11,865*l.*

Minerals.

The mineral production of the United States in 1892 was in excess of that of any previous year. The total value of all the mineral products of that year was 136,955,753*l.* This is 4,000,000*l* greater than the amount for any previous year. Among the large gains was that of 877,130 tons in pig iron, with an aggregate product of 9,157,000 tons valued at 26,232,208*l.* This, however, was more than counteracted in 1893, when the production of pig

iron is estimated to have decreased about 2,000,000 tons. The total value of metallic minerals for the year 1892 was 60,755,126*l.*; non-metallic 74,200,622*l.*, and unspecified 2,000,000*l.* Gold showed a slight loss, and the year's products, valued at 6,600,000*l.*, was 1,596,375 ounces. The total production of silver during the year was 58,000,000 ounces, which is an increase of 877,130 ounces compared with 1892. Copper gained 57,465,666 lb., making an aggregate of 353,275,742 lb., with a value of 7,595,428*l.* Lead product during the year gained 10,856 tons, aggregating 213,262 tons, with a value of 3,412,192*l.* There was a loss of 7,000 tons in zinc, and the new metal, aluminium, almost doubled in quantity. The year's product of zinc aggregated 87,260 tons, valued at 1,605,584*l.*, and of quicksilver 27,993 flasks, representing a value of 249,138*l.* Nickel for the year aggregated 92,252 lb., value 10,148*l.*; aluminium 259,885 lb., value 34,565*l.*; and platinum, 80 ounces, value 110*l.* The product of antimony was valued at 11,293*l.* Quantities and values of other non-metallic products during the year are given as follows:—

Articles.		Quantity.	Value.
			£
Building stone			2,741,325
Lime	Barrels	65,000,000	8,000,000
Natural gas			2,960,143
Cement	Barrels	8,758,621	1,430,550
Salt	„	11,698,890	1,130,983
Phosphate rock	Tons	681,571	659,245
Limestone for iron flux	„	5,172,114	722,096
Mineral waters		21,876,604	981,194
Zinc, white	Tons	27,500	440,000
Potters' clay	„	420,000	200,000
Mineral paints	„	47,917	148,848
Borax	Lbs.	13,500,000	180,000
Gypsum	Tons	246,374	154,309
Grindstone			96,000
Fibrous talc	Tons	41,925	94,497
Pyrites	„	114,717	61,038
Soapstone	„	23,908	87,489
Manganese ore	„	13,613	25,917
Asphaltum	„	36,930	58,475
Precious stones			59,800
Bromine	Lbs.	379,480	12,900
Corundum	Tons	1,771	36,260
Barytes	„	32,108	26,005
Graphite			20,800
Millstones			4,683
Novaculite			29,346
Marls	Tons	125,000	15,000
Flint	„	20,000	16,000
Fluor spar	„	12,250	17,800
Chromic iron ore	„	1,500	5,000
Infusorial earth			8,731
Feldspar	Tons	15,000	15,000
Mica	Lbs.	75,000	20,000
Ozokerite, refined	„	60,000	1,600
Cobalt oxide	„	7,869	3,147
Slate, ground as pigment	Tons	3,787	4,704
Sulphur	„	2,687	16,128
Asbestos	„	104	1,283
Rutile	„	100	60

Anthracite and bituminous coal.

In 1892 the output of Pennsylvania anthracite coal increased 1,613,458 tons, amounting to 46,850,450 tons, valued at 16,488,400*l*. The value increased 1,600,000*l*. The total shipments of anthracite coal from the three principal Pennsylvania districts, namely the Wyoming, Lehigh, and Schuylkill in 1892 was 41,893,321 tons, and for the year 1893 was 43,081,060 tons, an increase of 1,187,739 tons, which is a very satisfactory amount considering the extreme dulness of trade in the latter part of 1893. In the Lackawanna anthracite coal district there are 43 collieries, employing 14,215 persons, from which were mined during the year 1893, 5,848,858 tons of coal, a decrease from the year 1892, when 6,000,000 tons were mined.

An important event has been the dissolution of the Anthracite Coal "Combine," which had united the coal-mining and coal-carrying companies, practically giving the Philadelphia and Reading Railroad Company the control of 55 per cent. or 60 per cent. of the industry. The Reading, now that the Jersey Central and Lehigh Valley have parted from it, controls at present about 25 per cent. This change was produced without any great reduction of prices, as the producing companies were "carrying" their customers, and a break in prices would have endangered their "paper." Many customers would have been unable to meet their obligations promptly during the period of financial depression had there been a war in coal prices, and this would have led to an embarrassment of the producers themselves. The following extract from the history of the Reading "deals" as given by the late President, Mr. McLeod, before the master appointed to inquire into the receivership of that railroad, briefly explains the objects and effects of the "Combine":—

He stated that on June 27, 1890, he became president of the road. The physical condition of the road at that time, he stated, was not up to the standard. There was not a sufficient equipment. The mining capacity was much less than it should be, only about 6,500,000 tons being mined annually, the mining year averaging about 220 days. "We commenced," he continued, "to rehabilitate the road physically when I became president. Two new collieries were opened at a cost of about 400,000*l*. The mining capacity was increased to 10,000,000 tons. The reorganisation policy supplied sufficient money to bring the road and coal mines into a good business physical condition. It did not provide enough capital, however, for a commensurate future improvement of the road. There was not available capital enough to expand the business in a logical way.

"In 1877 the total consumption of anthracite coal supplied by the Reading, compared with the other roads, was about 34 per cent. At that time the annual tonnage was 6,500,000 tons. During the decade following 1877 there was not the normal expansion in the coal business. It should have been increased to a tonnage of 13,000,000 tons. By 1887 the annual tonnage had been increased only 500,000 tons. The tonnage fell short 5,500 000 tons of its quota. When I became president of the

road the amount of money invested by the Coal and Iron Company in coal lands was about 20,000,000*l.*, on which 6 per cent. or 7 per cent. interest had to be paid.

"What, therefore, was absolutely necessary in order to pay Reading dividends was to get a larger coal tonnage. There are to-day two-thirds of Reading's coal possessions undeveloped. Consequently the road is carrying land to the extent of 800,000*l.* per year from which there is no revenue, and on which there is no development. What I was trying to do was to increase the tonnage. I thought that we must try and utilise that large and idle area. My first thought was to put the physical condition into such a shape as to transport large tonnage, and also to get the mines into a condition to produce large tonnage. I increased the mining capacity from 7,000,000 tons to 10,000,000 tons per year, and I put in new equipments which enabled us to have the means of transportation. But the next question was to get a large enough market for our increased tonnage. Next I contemplated upon a plan of competition. But I was in doubt as to whether I could succeed, for our competitors were stronger and liable to hold out longer, and, therefore, I did not carry out this line of action.

"It was then that I conceived the idea of leasing two of the local company's competitors, and purchasing the coal of individual operators along the lines, and thus control the anthracite coal trade. This I did accomplish in February, 1892. By August 1, after many sacrifices, I had forced the price of coal to a satisfactory point. It was not then getting what it cost, but I did the best I could. Our competitors were mining all the coal that they could produce. Soon I found that by pursuing this line solely I could not put Reading on a dividend basis. I must get a market which would enable me to put the increased tonnage at a higher price.

"Having, as I have said, coal at a satisfactory but not compensating price, I sought to secure a large market that I could control. Reading even then was not getting by far the tonnage that it was entitled to. I then conceived the idea of controlling the New England market, not for any private or personal purpose, but for the interests of the Reading all the time. The Boston and Maine, and the New York and New England roads handled then anthracite aggregating 2,000,000 tons yearly, and bituminous aggregating 1,500,000 tons. I had made arrangements with bituminous operators to get the Reading into that market.

"The advantages which would accrue to the Reading from these New England deals would be an increased tonnage of 2,000,000 tons of anthracite coal, at a profit of 60 c. per ton, and of 15,000,000 tons of bituminous coal at a profit of 30 c. per ton. In addition the mining of these additional 2,000,000 tons of anthracite coal would reduce the cost of production of the entire 7,000,000 tons 15 c. per ton. Some estimated that the reduction in cost would be as great as 25 c. per ton, but I thought that a conservative estimate would be 15 c. Then again it would mean that the collieries would be kept going steadily. I figured that

these advantages, insured by the control of the Boston and Maine and the New York and New England, would net to the Reading 540,000*l*. There would be other incidental advantages, such as the interchange of merchandise traffic, which was already developing."

The following table shows the total amount of coal exported from the United States during the fiscal year ending June 30 :—

Year.	Quantity.	
	Anthracite.	Bituminous.
	Tons.	Tons.
1890..	795,753	1,136,068
1891..	924,312	1,474,727
1892..	808,277	1,700,496
1893..	1,073,111	1,773,556

Although a greater amount is exported from Philadelphia than from either Baltimore or New York, the percentage from Philadelphia in 1893 was not so great as formerly. The amount exported during the fiscal years ending June 30 was as follows :—

Year.	Philadelphia.		Baltimore.		New York.	
	Anthracite	Bituminous	Anthracite.	Bituminous	Anthracite	Bituminous.
	Tons	Tons	Tons.	Tons.	Tons.	Tons.
1890	20,480	350,668	115	34,872	84,238	6,864
1891	25,188	297,196	60	109,506	89,925	22,483
1892	16,566	402,477	...	42,885	40,700	1,441
1893	26,254	294,847	300	136,858	9,850	5,064

Bituminous coal in the United States increased 8,000,000 tons during the year 1892, attaining a total of 113,237,485 tons, valued at 25,039,027*l*. Several new veins of coal have been found, and some are being put into operation. A novel plan, it is claimed, has been tried while sinking a shaft 270 feet, for keeping the drilled holes from clogging, namely, dropping a chain, which is kept constantly in motion by machinery, down through each of the holes. A fresh impetus has been given to the coal mining industry of Clearfield County, Pennsylvania, as recent drill borings have shown an extensive tract to be underlaid with one of the largest veins of cannel coal yet found in that district. Preliminary shafting is now being made, and it is stated that several other old shafts in the immediate neighbourhood will be opened.

Considerable attention has recently been paid to the important question of the waste of anthracite coal in Pennsylvania by the existing methods of mining. Some years ago a State Commission was appointed to investigate the subject, and their report presents statistics which open to inventive genius a field which has too long been left unoccupied. Anthracite mining for the market dates

from 1820, and in the 73 years that have elapsed 1½ tons of coal has been wasted for every marketable ton produced, that is to say, 60 per cent. of the deposit has either been sent to the culm heap as worthless, or has been lost in the mine as a result of unsafe or unscientific methods. The total production has been 902,000,000 tons, in the getting of which 2,225,000,000 tons have been used up. The original deposits are estimated to have contained 19,500,000,000 tons, and by the same estimate there now remains to be marketed by present methods, from the Lehigh region 477,500,000 tons, but little over the amount already used up in that district; from the Wyoming district 1,859,000,000 tons, two-thirds as much as has been consumed there; and in the Schuylkill region, 4,561,000,000 tons. The Schuylkill is still practically a virgin field, but at the driving pace at which new operations are starting there it affords little hope of a protracted future.

The report of the Commission points out improved methods by which much of the waste of the past may be redeemed, and in the future be saved. In the earlier days of anthracite mining thousands of tons of good coal were sent to the culm heaps. The washeries of recent years are doing much to reclaim this. The use of smaller screens in the breakers is saving, for steam-making purposes, a size of coal heretofore regarded as without value. The mixture of culm with bituminous coal has demonstrated at once a solution of the problems of the smoke nuisance, and the disposition of the mountains of culm scattered over the coal-producing area; for this mixture produces no smoke from a chimney 100 feet high, while giving perfect satisfaction as a cheap steam-raising fuel.

But important as these advances have been in utilising the coal heretofore rejected, they must be supplemented by better systems of mining, preparing, and carrying the fuel; and it is here that the scientists of the Commission invite the entrance of inventive genius to the neglected field. In thousands of details mining is carried on to-day in the most primitive fashion, and though during recent years much progress has been made, the opportunities are still boundless. With the exhaustion of one region within 20 or 30 years, to be followed by another not many years later, humaniy, if no other consideration, calls for a suspension of the reckless system now in use and the application of more economical methods.

The river business in connection with the coal trade is very peculiar, but it gradually increases, and has reached enormous proportions. The Monongahela Slackwater Navigation Company began business in 1844, and shipped that year, in round figures, 737,150 bushels; in 1845 they shipped 4,605,185 bushels; in 1888, 115,800,000 bushels; in 1889, 81,162,000 bushels; in 1890, 116,300,000 bushels; and in 1891, 106,914,700 bushels. In 1892 there was a falling-off, owing to the long strike of the miners that year, and it only amounted to 97,448,350 bushels; and also a decrease in 1893, when it amounted to 96,501,800 bushels of coal, most of which was destined for shipment to the southern markets.

The coke handled amounted to 290,500 bushels. The total tolls earned in 1893 were 52,004*l.*, and semi-annual dividends of 3 per cent. and 2 per cent. were declared. There has recently been a revival of a movement to establish free locks up the Monongahela. Strikes caused a very considerable fall in the early spring shipments from the company's pools. After the middle of March, 1893, operations were resumed, and had it not been for the long-continued drought the aggregate coal shipments, according to the president's report, would probably have been in excess of any previous record. It was impossible to bring the empty barges and coal boats back to Pittsburg owing to the low water. During the long delay there accumulated in the company's pools and in the harbour nearly 2,000 loaded vessels, carrying fully 25,000,000 bushels, or nearly 1,000,000 tons, of coal. It is estimated that it would take about 400 miles of railroad cars to haul this amount of coal.

Navigation in the Ohio was very uncertain during 1893. Owing to strikes and low water the year's shipments were the smallest in 12 years. There were no shipments by river from June until November. The 25,000,000 bushels loaded in the harbour and pools had to be cared for at considerable expense. The largest shipment on record was in 1888, viz., 109,852,000 bushels; the shipment in 1893 only reached 62,445,000 bushels, being Cincinnati 21,999,000 bushels, and Louisville 40,446,000 bushels.

The supply of petroleum is declining rapidly, although new wells are being constantly bored, many of them with good results. In 1891 there were 54,000,000 barrels produced, but in 1892 only 50,509,136 barrels, valued at 5,206,839*l.* The yield of oil in Pennsylvania has in the past been phenomenal, one field having yielded 150,000,000 barrels. The price at the close of 1893 had increased about 33 per cent.

Petroleum.

The export of petroleum from Philadelphia has steadily grown, and a larger percentage of the trade falls each year to the trade of this port. In the year 1891, 11,390,747 barrels were exported from the United States, of which amount 34·59 per cent. was exported from Philadelphia. The following table shows the exports for 1892 and 1893. (In estimating the amount, 50 gallons of bulk oil are taken as making a barrel, and five cases a barrel.

	From January 1 to December 31, 1892.		From January 1 to December 31, 1893.	
	Quantity.	Per Cent.	Quantity.	Per Cent.
	Barrels.		Barrels.	
Philadelphia	4,910,739	38·04	6,252,518	38·96
New York	7,696,388	59·62	9,256,441	57·67
Baltimore	301,651	2·34	542,050	3·37
Total	12,908,778	100·00	16,051,009	100·00

The percentage of Philadelphia during the first 10 months of 1893 was even greater, being 39·21 per cent.

The increase in the total amount exported was greater than has been experienced in any recent year, the fluctuations between 1886 and 1891 having never amounted to more than 1,000,000 barrels, whereas the increase of 1892 over 1891 was 1,500,000 barrels, and that of 1893 over 1892 was 3,000,000 barrels.

Tin-plate.

In 1892 tin from the mines in California amounted to 160,000 lbs. The aggregate for the year was 162,000 lbs., valued at 6,480*l.*

The fostering of the manufacture of tin plates by protective tariff has not met with the success which was anticipated by its promulgators, although various so-called tin-plate factories have sprung into existence. During the year ending June 30, 1893, there were made 45,743,107 lbs. of tin plates, 54,173,895 lbs. of terne plates, or a total of 99,819,202 lbs. This is about one-seventh of the annual consumption. In this production there were used 43,599,724 lbs. of American black plate, and 56,219,477 lbs. of foreign make.

According to figures compiled last October the product of the tin-plate industry showed an increase from 785,547 lbs. for the quarter ending September 30, 1891, to 18,264,225 lbs. for the quarter ended June 30, 1893, or about 2,314 per cent. During the quarter ended September 30, 1893, 35 firms manufactured 27,145,480 lbs. of tin and terne plates proper. Of this output 8,794,027 lbs. were made from sheets rolled in the United States. Of the output of commercial plates, 13,861,163 lbs. were coated with tin, and 13,284,317 lbs. were terne-coated. Nearly 96 per cent. of the commercial plates belonged to the lighter class.

The production of black plates was 11,355,368 lbs., of which 8,147,092 lbs. were of the lighter class. Of the 35 firms that made sworn returns of the manufacture of commercial tin and terne plates, 28 used American black plates wholly or in part. The aggregate consumption of American plates in the various forms of the manufacture was equal to 86 per cent. of this country's entire production of such plates.

The duty on tin plate went into effect on July 1, 1891, and since then the prices on the article have ruled slightly higher than they did before the protective duty was imposed. The Government's revenue from this source in 1892 amounted to 2,765,074*l.* The lowest average selling price of 1C 14 in. by 20 in. coke plates in this country in 1890 was 4 dol. 50 c., and the highest 5 dol. 75 c. According to the last report of the Treasury Bureau of Statistics, the same kind of plates sold on August 25, 1893, for 4 dol. 80 c., and on October 27 for 5 dol., but in December were selling at almost any price. The additional duty placed upon a box by the McKinley Act was 1 dol. 37 c.

Iron and steel.

Since about the middle of the last century, Pennsylvania has been noted as the leading iron and steel making State in the Union. The first successful attempt to establish an iron works in this State was made 1716, the iron industry being firmly estab-

lished in 1728, when the colony exported to the mother country 274 tons of pig-iron. The growth since then has been phenomenal. In 1810 there were in Pennsylvania 44 blast furnaces, 78 forges, 4 bloomeries, 18 rolling and slitting mills, 6 air furnaces, 50 trip hammers, 5 steel furnaces, and 175 naileries. The furnaces produced 26,878 gross tons of "cast-iron," the product of the whole country, with 153 blast and air furnaces, being 53,908 tons. The product of the five steel furnaces was 531 tons, valued at 16,229*l*. In 1840 there were 213 furnaces in Pennsylvania and 169 forges and rolling mills. In 1850 there were 298 furnaces, 121 forges, 6 bloomeries, and 79 rolling mills. Of the furnaces existing in 1850, nearly all were charcoal furnaces, only 57 being anthracite, and 11 bituminous coal and coke furnaces. The production of the furnaces in 1849 was 253,025 tons; of the bloomeries, 335 tons; of the forges, 28,495 tons; and of the rolling mills, 108,358 tons. Whereas in 1890, the total production of pig-iron in Allegheny county, Pennsylvania, alone was 1,337,309 gross tons (2,240 lbs.). In the second half of the year 1892 Pennsylvania's production was 1,976,973 gross tons, and 2,225,962 gross tons in the first half of 1893. The State which produced the next largest amount during that period is also in this Consular District, namely, Ohio; the product being 570,578 gross tons in the second half of 1892, and 594,643 tons in the first half of 1893. While Michigan produced 93,231 tons and 81,307 tons; and Indiana, 2,269 tons, and 5,313 tons for the same periods respectively. The total production of pig-iron in the United States for the portion of 1892 referred to was 4,769,683 tons; and 4,562,918 tons for the period of 1893; so that the production of Pennsylvania, as has been the case for many years, was practically half of that of the entire Union.

The production of Bessemer pig-iron in the first half of 1893 was the largest half-yearly production experienced, amounting to 2,374,890 tons (gross), against 2,189,696 tons in the second half of 1892, and 2,254,345 tons in the first half.

While the influence of improved forms of furnaces, hot blast stoves, and blowing engines should be considered among the causes of the increased output of pig-iron, it is undoubtedly true that a large share of it is due to the substitution of coke for coal as fuel. Previous to 1875, 1·85 tons of anthracite coal was used to produce a ton of pig-iron. Now, in the Pittsburgh district, where there are 23 blast furnaces, the yield of pig-iron is 1 ton to 1 ton of coke; while a furnace at the Edgar Thompson Steel works is said to have used as low as 1,845 lbs. of coke to produce 1 ton of iron. The productive power of the Edgar Thompson furnace at Pittsburgh, which is the largest in the United States, is interesting, especially when compared, as was the case at the Exhibition at Chicago, with the largest furnace in the United Kingdom, that at Newport. The figures so given are as follows:—the English furnace has a capacity of 30,000 cubic feet, produces daily 70 tons, uses 2,308 lbs. of coke to 1 ton of product, with 150 hours as the time of a furnace operation. The United States furnace with much smaller capacity, 18,000 cubic feet, produces daily 271 tons, uses only 1,863 lbs. of

coke to 1 ton of product, and crowds an operation into 21 hours. This well exemplifies the method in which production is "rushed" in the United States.

The price of pig-iron reached at the close of 1893 the lowest price at which it has ever been quoted here. The cost of production and the selling price may be estimated as follows :—

Six Months ending December—	Total Cost Per Ton Pig-Iron.	*Average Price No. 1 X Pig-Iron at Philadelphia.
	Dollars.	Dollars.
1855	20·57	27¾
1860	14·02	22¾
1864	36·07†	59¼
1870	24·41	33½
1872	29·20	48⅞
1875	20·32	25¼
1878	14·36	17⅛
1880	17·47	28½
1885	13·06	18
1887	15·41	21
1890	14·20	18½
1891	14·10	17½

* The standard quotation in the United States. † The highest.

The depression in trade, however, during 1893, resulted in quotations of 15 dol. to 15 dol. 50 c. on July 31, 1893, and 14 dol. 50 c. to 15 dol. (or 3*l.*) in September, and the output has decreased very considerably, many of the furnaces being idle.

Stimulated by the demands of the furnacemen the manufacture of coke in the United States has increased to a very large extent. In 1891 the coke industry was in progress in no less than 20 States, requiring 40,245 ovens. The output of coke that year, according to the United States census, was 10,352,688 tons. The manufacture of coke on a large scale in the United States was first started in the Connellsville region, in Pennsylvania, and this State still holds the lead in the number of ovens and extent of output. It is conceded by blast-furnace operators that the Connellsville product gives better results than any other coke made in this country, and it is shipped to all parts of the United States to which freight rates are not so high as to prohibit its use. There are 17,315 ovens in the basin. The Connellsville coke region takes its name from the town of Connellsville, near which the manufacture of coke was begun. The first was made in this region in 1841 in two ovens, which were built from a description given by an Englishman of the ovens in Durham, England. From this small beginning has grown a business that in 1891 amounted to an output of nearly 5,000,000 tons, or nearly one-half the product of the United States, giving direct employment to about 18,000 men.

The comparative prices of iron and steel in Great Britain and the United States, with reference to competition, from latest quotations, are Bessemer pig in Great Britain at 2*l.* 6*s.*, or 11 dol. 19 c.;

at Pittsburgh for the same article, 11 dol. to 11 dol. 25 c.; though at the end of December, 1893, it fell to 10 dol. (less than 2*l.*). Steel billets quoted at 4*l.* 2*s.* 6*d.*, or 20 dol. 5 c. in Great Britain, are quoted at 16 dol. 75 c. at Pittsburgh.

The following table shows the cash price of iron, steel, and various other articles in the United States for the last week in December from 1889–93 :—

Description.	1889.	1890.	1891.	1892.		1893.
				From—	To—	
	Dol. c.	Dol. c.	Dol. c.	Dol. c.	Dol. c.	Dol. c.
Bessemer	24 50	16 50	15 75	13 75	13 80	11 00
No. 1 foundry ...	20 25	17 25	16 00	14 25	14 50	12 25
No. 2 foundry ...	19 50	16 25	15 25	13 25	13 50	11 25
No. 3 G. forge ...	19 00	14 75	13 65	12 60	...	10 00
No. 4 G. forge ...	17 75	14 25	13 25	12 50	...	10 00
White iron	17 25	14 25	13 25	12 00	...	10 60
Mottled	16 25	14 25	13 25	12 00	...	10 25
Silvery	21 00	16 50	17 00	16 00	...	15 50
F. mang. 80 p.c. ...	105 00	65 50	63 00	60 00	62 00	52 50
Charcoal—						
No. 1 foundry ...	24 00	24 00	22 50	20 00	...	18 50
No. 2 foundry ...	22 50	22 50	20 50	19 00	...	18 00
Cold blast	27 00	26 00	26 50	25 00	26 50	25 00
Warm blast ...	25 00	24 50	19 50	19 00	...	18 00
Spiegel, 20 p.c. ...	36 00	30 00	27 00	28 50	...	23 75
Muck bar	31 75	29 50	28 00	24 50	24 75	21 00
Steel billets ...	37 25	26 00	24 50	22 00	23 00	16 75
Steel rail ends ...	26 50	17 75	17 25	15 50	16 00	11 50
Steel bloomends ...	26 50	17 50	17 25	16 00	...	12 00
Old iron rails ...	28 00	26 00	23 25	20 00	21 00	14 50
Old steel rails ...	24 50	18 50	17 50	14 50	15 00	10 50
No. 1 W. scrap ...	24 00	22 00	24 00	20 00	21 00	7 25
No. 2 W. scrap ...	20 00	18 00	17 50	15 00	...	6 00
New steel rails ...	36 00	29 00	30 00	30 00	...	24 00
Bar iron	1 95	1 85	1 65	1 60	1 65	1 45
Iron nails	2 50	1 90	1 60	1 55	...	1 10
Steel nails	2 50	1 90	1 60	1 55	...	1 10
Wire nails	3 00	2 10	1 70	1 55	...	1 20
Coke at furnace ...	1 75	2 15	1 90	1 90	...	1 15

The increased productive powers of the United States make it necessary to find a larger market, to prevent periods of depression from over-production. The Eastern Pennsylvania industry depends considerably on the question of the raw material, iron ore; the tariff duty on which is exciting great interest. Pittsburgh controls the western iron district because it is nearer to the coke-fields, but especially to the lake ores which yield 60 per cent.; while the eastern districts, the region around Reading, for instance, only yield 40 per cent. This difference in yield militates against Eastern Pennsylvania, except those connected with the Cornwall mines, as the ores have to be hauled from the lakes or from New Jersey and New York. To Eastern Pennsylvania especially, therefore, the free importation of iron ore is important.

The iron ore imports for the last 4 years are as follows :—

RETURN of Iron Ore Imports during the Years 1890–93.

For Fiscal Year Ending June 30—	At Philadelphia.			At Baltimore.			At New York.		
	From Cuba.	From other Foreign Countries.	Total.	From Cuba.	From other Foreign Countries.	Total.	From Cuba.	From other Foreign Countries.	Total.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
1890	141,852	518,509	660,361	127,010	294,622	421,632	2	38,869	38,871
1891	73,578	369,680	443,258	243,460	220,986	464,446	..	23,117	23,117
1892	91,806	440,007	531,813	168,233	253,479	421,712	..	34,453	34,453
1893	105,142	194,649	299,791	292,127	59,832	351,959	2,500	6,661	9,161

The manufacture of Bessemer and basic steel is being steadily cheapened. Steel in the rough is now sold at Pittsburgh at 21 dol. 75 c. (4*l.* 10*s.*) per gross ton, a fraction less than ½*d.* per lb. In 1867 steel rails there cost 33*l.* 2*s.* per ton; in 1872, 22*l.* 8*s.*; in 1882, 9*l.* 14*s.*; and now they cost 6*l.* (30 dol.) per ton. The United States in 1892 manufactured 4,277,000 tons of steel, which is said to exceed the amount manufactured in Great Britain. The Bessemer process is that most largely employed here, although there are six open hearth furnaces. As many of the ores in the United States, especially those in the Southern States, contain a notable percentage of phosphorus, which in steel makes the metal brittle, the basic process in several instances becomes necessary. The introduction of improved machinery has had a great influence on decreasing the cost of production; its use is increasing in mining the ore, in getting out the limestone to be mixed with the coal and ore, and in saving manual labour at every stage of the process. One machine alone at the Carnegie works in Pittsburgh is said to have cost 200,000*l.* The demand for steel is constantly increasing as its value over iron has become appreciated. A steel rail lasts about 10 times as long as an iron one, and the railroads are adopting their use very generally. For structural purposes also steel is gradully superseding iron. Further experiments are being made with nickel as an alloy to exalt its tensile strength, which recent tests of armour plate made of nickel steel have proved successful. In view of the progress made, it is expected that with the use of nickel steel there may be longer bridge spans, higher towers, lighter boilers and engines, and machinery driven quicker than ever before.

Textile.

The textile industries of the United States have suffered a severe period of depression during almost the entire year 1893; and the numerous industries of that nature in this Consular District have suffered proportionately. At the close of the year it was estimated that over half the woollen manufacturers were idle, and, except for a brief recovery in November, had been so ever since new wool came into the market in May. The following table shows approximately the actual sales at the three chief markets, Philadelphia, Boston, and New York for the 8 months of 1892–93, the figures given being totals for weeks most nearly corresponding to the exact months:—

Month.	Quantity.	
	1893.	1892.
	Lbs.	Lbs.
May	11,393,650	20,479,150
June	9,900,476	21,144,650
July	14,281,950	38,586,750
August	6,484,787	29,605,600
September	14,473,275	31,080,500
October	13,665,652	29,031,953
November	23,901,671	21,457,600
December	12,694,697	20,952,800
Total	106,796,158	212,339,002

In November, 1893, out of 99 woollen works in the Eastern States, only 10 were working full time, while 45 were shut. The production for the previous 4 months was 14,343,431 yards against 25,554,306 yards in 1892. The price also fell 20 per cent. for fleece to the lowest price ever known here. In that month the State factory inspectors reported that out of 90,000 persons usually employed in textile mills in Philadelphia, only 17,500 were at work.

The importation of wool into the United States has steadily increased during the past 3 years, in spite of the heavy duty imposed, which in 1893 amounted to 1,629,444*l.*, and the depression in the textile industries. The official figures, beginning in 1890, and covering the full period of the McKinley tariff, are as follows:—

Year.	Quantity.
	Lbs.
1890	105,431,285
1891	129,303,648
1892	148,670,652
1893	172,433,838

The production of wool has entirely failed to keep pace with the consumption. Sheep-growing, in fact, has declined; much of the land becoming too valuable for that purpose, as settlement progresses; and the United States have been compelled to draw upon Australia, Argentina, and other regions for varieties of wool to mix with the native product in making fabrics. While the United States clip has only trebled, under increasing protective tariff since 1860, the Australian clip has increased ten-fold, the South American nine-fold, and the South African five-fold.

There has also been a great reaction in cotton-spinning. In 1890 the cotton mills of the country were employing 221,000 persons; in 1893 the production was about one-fifth less, and the

sales fully one quarter less. The best gauge of this is the takings of cotton by northern mills. To October, 1893, this was 29,352 bales for that year; 86,264 bales, in 1892; 115,009 bales, in 1891; and 156,292 bales, in 1890.

The manufacture of ingrain carpets is an important textile industry in Pennsylvania. There are 80 factories in the United States operating power looms on these goods, and they are confined to five States as follows:—

State.	Number of Factories.	Number of Looms.
Pennsylvania	67	3,281
Massachusetts	1	410
New York	7	407
Connecticut	2	274
New Jersey..	3	110
Total, United States ..	80	4,482

Of the 67 ingrain establishments in the State of Pennsylvania, all but two are located in the city of Philadelphia, where 3,085 looms are in operation, manufacturing at least three-fourths of the entire ingrain product of the country. The products of the Philadelphia ingrain mills for the census year ending in June 1, 1892, amounted to about 30,000,000 square yards of carpeting, valued at over 2,400,000*l.*, and these figures may be taken as a fair average by which to estimate the entire product of the United States for 1892, which could be safely reckoned at 40,000,000 yards of all kinds, valued at about 3,200,000*l.* The maximum output of all the ingrain looms in the United States, working 300 days per year, would probably reach 48,000,000 yards.

The factory inspector for Pennsylvania, Mr. Watchorn, reports that 2,000 inspections were made of factories and mercantile establishments, where 231,000 people were employed in 1892. The inclination to work children overtime, he says, has been strongly manifest, and several manufacturers who do business on a large scale have been prosecuted. He has also endeavoured to have the law compelling the semi-monthly payment of wages enforced. It is hardly likely that his report for 1893, when published, will contain complaints of overtime work. He regrets that he is unable to report on the vital question of earnings. He alludes to the sweating system thus:—"The sweating system, which has been a subject of investigation on the part of the United States Government, has disclosed the fact that Philadelphia is the first city in the United States in the carrying on of the system. It is well known to us that it exists, and that tender children and feeble women are employed, who toil long weary hours for a mere pittance, and I may say that, were it incumbent on my department to collect these facts, we would astonish the commonwealth with an array of facts and figures which would amaze thousands of

good citizens who are now passive on this great question, because they are unconscious of the prevalence of this great evil. I am quite hopeful that we shall shortly receive additional strength and enlarged powers of usefulness, so as to cope with this hitherto unrestricted abuse." In conclusion Mr. Watchorn recommends:—

1. An increased force of factory inspectors.
2. An increased appropriation for expenses of inspectors.
3. The placing of all manufacturing establishments under the jurisdiction of the factory department.
4. The right of factory inspectors to collect statistics of the earnings of factory employés.
5. The restriction of the hours of labour of minors and women to 10 hours per day and a half day on Saturday.
6. The matter of exits from factories in case of fire to be left with the factory department, without conflicting orders of municipal or county authorities.

Tanneries.

The tanning industry is an important one in Pennsylvania; the number of persons employed in the operation of the 358 plants, which are in the State, being 13,540; besides 8,425 who are employed during the peeling season; the value of the plants and lands is estimated by the State Bureau of Industrial Statistics to be over 4,000,000*l.*; the value of the leather tanned in the year to be over 11,000,000*l.*; and the value of the hemlock and oak bark extracts over 100,000*l.* Several of the tanneries are small, but 53 employ between 50 and 100 men, while 42 employ more than 100 men. Oak and hemlock bark, which contain from 10 to 20 per cent. of tannin, are the chief sources from which the tanners of Pennsylvania derive that substance. It is estimated by conservative lumbermen that the supply of hemlock will last about 20 years in this State. The lumbermen in 1893 agreed to curtail their product, and only about 60 to 70 per cent. of the usual amount was hewn; this caused an increase in price per cord from 1*l.* to 1*l.* 2*s.* Nearly all the hides produced in the United States are manufactured into leather in this country, as well as nearly 2,000,000 hides, and about 5,000,000 skins imported annually from other countries, for which purpose Philadelphia, Boston, and New York are the chief receiving ports.

Strikes.

There were only 26 strikes in Pennsylvania during the year 1892, a much smaller number than usual: half of them were by those in the iron and steel industries; eleven of them occurring in Philadelphia and four in Pittsburgh. The total number of persons engaged was 4,208, and the number involved 7,414. Only three strikes succeeded; four partly so; while the others failed. The total loss incurred by the men was 74,649*l.*, while the estimated loss of the employers was 10,197*l.* The foregoing summary, however, does not include the strike at the Homestead Steel Works, near Pittsburgh, belonging to the Carnegie Steel Company, the

causes and consequences of which are separately recorded. The capital of the corporation is 5,000,000*l.* and the total number of persons employed at the several plants owned and operated by the company is 13,000 men. For many years the company has employed a large number of skilled workmen who belong to the Amalgamated Association of Iron and Steel Workers. At the end of June, 1892, a 3 years' contract was to terminate. The workmen were paid by the ton, the amount they received depending on the selling price of steel billets. Their wages could advance without limit under the scale, but a minimum was fixed at 25 dol. (5*l.*) per ton, selling price, below which they were not to decline, but to remain fixed at that minimum. The company submitted a proposition for the renewal of the contract under terms, of which the most important features were :—

(1) A reduction in the minimum of the scale for billets from 25 dol. to 22 dol.

(2) A change in the date of the expiration of the scale from June 30 to December 1 ; and

(3) A reduction of tonnage at those furnaces and mills in which important improvements had been made and new machinery added :

The reasons given were (1) the decline in the market price of steel ; (2) that the company was less active at the end of the calendar year than in midsummer, and contracts were often made for the entire year with the customers, thus enabling them to judge the prospects of business better, and (3) that the output and consequently the earnings of the workmen had been greatly increased by the improvements made. The association refused these terms, but proposed to reduce the minimum to 24 dol. ; and the company made a counter proposition of 23 dol. per ton for steel billets as the minimum selling price to which the wages should be scaled. While these negotiations were pending, the superintendent of the Homestead Steel Works, which was the principal scene of the strike and where 3,800 men and boys were employed, had concluded contracts with all the hands except 325 men of the highest skill who were employed in three of the twelve departments. Of this number 280 would have been affected by the tonnage reductions, and about 45 more by the tonnage reductions and scale minimum. The increase of tonnage was estimated thus :—32-inch slabbing mill, increase, 20·6 per cent. 119-inch plate mill, increase 32·3 per cent. Open-hearth furnaces, increase 17·5 per cent.

A comparison of the wages earned in the highest-paid positions under the 1889-92 scale with those which would be earned under the proposed 1892–93 scale, shows as follows :—

	1889-92 Scale, 26 dol. 50 c. Basis.		Proposed 1892-93 Scale, 26 dol. 50 c. Basis.		
	Rate per 100 Tons.	Daily Earnings.	Rate per 100 Tons.	Daily Earnings.	Minimum, 23 dol. Basis.
	Dol. c.	Dol. c.	Dol. c.	Dol. c.	Dol. c.
32-inch slabbing mills (12 hours)—					
Heater	4 31	6 37	4 31	7 68	6 67
Screwman	4 61	6 81	...	...	6 41
Heater (first helper)	3 07	4 53	3 07	5 47	4 75
Roll tableman	2 50	3 69	1 60	2 85	2 47
	12 hours.		8 hours.		
The 119-inch plate mill—					
Heater	22 00	14 66	11 00	7 43	6 45
Heater's helper	15 00	10 00	6 00	4 05	3 52
Roller	14 00	9 31	14 00	9 45	8 20
Screwman	11 50	7 66	11 00	7 43	6 45
Tableman	10 00	6 65	8 00	5 40	4 60
Shearman	13 00	8 66	11 00	7 43	6 45
Open hearth furnaces—					
Melter's helpers (1)	18 00	3 60	16 00	3 76	3 26
" (2)	15 00	3 00	13 00	3 06	2 66
Ladleman (1)	17 00	3 40	16 00	3 76	3 26
Pitman (1)	17 00	3 40	16 00	3 76	3 26

During the remainder of the month other steps towards an agreement were taken, but the relations nevertheless between the officers of the company and the workmen grew worse, and on the last day of the month all the departments were closed.

The chairman of the company, Mr. Frick, began making arrangements for the employment of 300 members of Pinkerton's Detective Force to act as watchmen or guards of the property, and requested the sheriff to appoint them as deputies, or accept them as his posse, to guard the works. The workmen showed their intention of preventing the employment of non-union men. An advisory committee of 50 was organised which exercised a general control over Homestead. Guards were stationed by them at all the gates, the river and streets were patrolled, and all strangers closely scrutinised. The works covered 40 acres or more of ground, and were enclosed on three sides by a high plank fence, and on the other by a steep bank that descended to the river. On the morning of July 5 the "Pinkertons" arrived by the river on barges towed by a small steamer. A patrol steamer used by the strikers gave an alarm of her whistle which was echoed by all the engines about town controlled by the workmen. An immense crowd gathered along the river banks, firing pistols and other arms. They tore down the fence to prevent the "Pinkertons" reaching the landing. After a short war of words, a fusilade commenced, some being killed and many wounded on both sides. The "Pinkertons" had made port-holes in one of the barges, from which they fired, and the people arranged breastworks out of the iron girders and other materials found in the yards and about the mills. Oil was also thrown into the river, with the intention of burning the barges. About 5 o'clock in the afternoon the "Pinkertons" hoisted a white flag and negotiated a surrender, having found it impossible owing to the heavy firing for the

steamer, which had taken some of the wounded away, to return and tug away the barges. They were allowed to take out their clothing, but their rifles, pistols, and everything else were taken possession of by the Homestead people, and the barges were set on fire. They were escorted through the town by their capturers, amid the hooting of the infuriated populace, and sent to their homes by train.

The sheriff endeavoured to deputise sufficient citizens to keep the peace, but failing in this he applied to the Governor of the State for military aid. On July 10 the Governor ordered the entire division of the National Guard of Pennsylvania to Homestead. The three brigades reported for duty at Homestead on July 12. As soon as the soldiers began to arrive the Carnegie Company took possession of their works, and began to make preparations to resume with non-union men, the new hands being at first fed and housed within the enclosure. Several months passed away before the company was able to employ all the men it desired. Many of the men of the other mills of the company in the meantime went out on strike in sympathy with the Iron and Steel Workers' Association. The company endeavoured to persuade its old hands to return, giving them till July 21; not one responded. At this time about 150 men were employed. Later they began to return, however, and in September about 300 had gone to work. On July 23 Mr. Frick, the chairman, was shot in his office, but not by one of the strikers. The soldiers were gradually withdrawn, the last disappearing from the scene on October 13, at which time the mill was in full operation with non-union men. Subsequently there were many arrests, trials, acquittals, and convictions for various actions connected with this great strike, and a Committee of Congress was appointed to investigate the circumstances.

Though the strike was ended in October, its formal termination was not declared until November 20, when the disposition to return to work was very general, and many have since returned. Regarding the strike as lasting nearly 5 months, as the monthly pay roll was about 50,000*l.*, the loss to the strikers for that period would be about 250,000*l.* The Secretary for Internal Affairs, Pennsylvania, reports that the expense to the State in sending and maintaining the National Guard at Homestead was 88,051*l.*

Failures.

The number of failures of business firms and corporations in 1892 in the United States was 10,270, with liabilities of 21,719,049*l.* and assets of 10,954,821*l.*, the assets being about half of the liabilities. The number and amount of 1893 has never been equalled; there were 15,508 failures, with liabilities 76,430,735*l.*, and assets 46,297,346*l.* The redeeming features of this disastrous year are the high proportion of assets to liabilities, 65 per cent., and the fact that only 1½ per cent. of the entire business firms of the country failed. In the foregoing only those firms are considered to have failed whose actual assets were smaller than liabilities, in other words, in which their creditors lost something. Of the commercial failures the liabilities of manufacturing firms amounted to about 33,600,000*l.*; of trading firms, 25,000,000*l.*; and about 17,800,000*l.* of other firms.

In New York State the increase in 1893 was more than five-fold over 1892, and in Pennsylvania the increase was from 2,200,000*l.* to 5,600,000*l.* Seven States have three-fifths of the liabilities, the millions (dollars) being divided among them as follows:—New York, 98; Illinois, 32; Pennsylvania, 28; Missouri, 25; Wisconsin, 24; Massachusetts, 23; and Iowa, 17. The greatest change is in Iowa, where the 215,800*l.* of 1892 grew to 3,509,000*l.* in 1893.

The business failures are classified in districts by the "Bradstreet Company" as follows, the States of this Consular District being Pennsylvania in the middle district, and Indiana, Michigan, and Ohio in the western district:—

PROPORTIONS of Failures to those in Business during the Years 1893–90.

	1893.		1892.		1891.		1890.	
	Number in Business.	Number Failing.	Number in Business.	Number Failing.	Number in Business.	Number Failing.	Number in Business.	Number Failing.
Middle	276,771	3,402	280,528	2,515	277,724	3,002	273,956	2,803
Eastern	104,679	2,143	104,939	1,659	101,182	1,789	98,245	1,480
Southern	162,363	2,399	161,690	1,915	157,586	2,412	151,091	1,655
Western	328,951	4,284	322,736	2,035	310,290	2,602	299,842	2,500
North Western..	122,375	1,712	119,138	983	113,568	1,264	110,226	1,132
Pacific	54,296	1,198	53,737	991	48,646	1,182	48,238	1,032
Territories	10,375	370	8,796	172	8,025	143	7,822	71
Totals, United States ..	1,059,896	15,508	1,051,564	10,270	1,018,021	12,394	989,420	10,673

As to causes of failure, they are classified as follows :—

SUMMARY—Business Failures in the United States, Classified as to Causes.

Failures Due to—	Number.				Assets.				Liabilities.			
	1893.	1892.	1891.	1890.	1893.	1892.	1891.	1890.	1893.	1892.	1891.	1890.
					Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.
Incompetence	2,546	1,916	2,021	2,005	14,637,994	6,599,192	8,563,259	10,656,524	28,408,626	13,445,228	16,268,941	21,545,326
Inexperience	240	532	592	611	2,521,108	1,436,649	4,077,785	1,951,933	4,681,366	3,320,954	6,021,670	3,562,065
Lack of capital...	5,194	3,343	4,869	4,052	41,924,159	15,209,975	34,572,098	23,571,043	75,698,494	29,376,617	61,716,157	45,818,944
Unwise credits	726	410	509	502	8,469,994	2,639,736	5,389,382	3,965,656	13,150,588	4,672,267	9,223,319	7,204,055
Failures of others	446	196	279	257	22,412,529	3,532,469	8,723,326	9,745,954	38,081,261	7,199,045	16,195,080	20,790,648
Extravagance	198	148	251	232	2,328,131	819,942	1,399,991	1,265,670	3,750,923	1,707,050	2,584,181	2,626,381
Neglect	481	311	383	390	1,596,454	812,761	1,049,640	1,223,198	3,921,044	1,750,364	2,079,709	2,411,502
Competition	191	180	199	246	1,947,123	617,717	929,215	1,235,549	3,356,695	1,283,845	1,856,352	2,194,551
Disaster...	3,463	1,974	2,075	1,358	116,517,450	15,425,349	21,959,012	28,637,846	173,542,729	28,031,994	40,736,054	42,650,814
Speculation	181	197	341	604	12,590,502	4,132,620	12,198,055	8,917,424	21,263,220	7,613,610	23,356,718	19,616,481
Fraud	1,142	1,063	875	416	6,541,336	3,547,696	4,031,237	1,604,828	16,298,830	10,194,274	13,139,819	6,612,069
Totals	15,508	10,270	12,394	10,673	231,486,730	54,774,106	102,893,000	92,775,625	382,153,676	108,595,248	193,178,000	175,032,836

A decrease of business was also general in 1893 compared with 1892. In textile manufactures the decrease is estimated at 41 per cent.; all woollens over 47 per cent.; silk, 43 per cent.; cotton manufactures, 37 per cent.; hosiery, 29 per cent.; and mixed textiles, 25 per cent. In iron and steel manufacture, 39 per cent.; but in hardware only 18·5 per cent.; in furniture, 27 per cent.; in jewellery, 24 per cent.; and in sale of hats only 18·6 per cent.

Banks. There were 370 bank failures, besides numerous suspensions, in 1893, but the condition of Pennsylvania banks has been very good. On December 30, 1893, there were 178 organisations under the supervision of the State Superintendent of Banking, of which 80 were banks, 16 saving institutions, and 82 trust companies. Six of them were formed last year. Bank capital increased from 8,986,928*l.* to 9,376,237*l.*, a difference of 389,309*l.* The total increase in all the institutions during the year 1893 was 484,494*l.* There were only three failures of banks under the supervision of the Superintendent, although a number of private banks were swept out of existence during the panic.

In the other States of this Consular District the condition of the banks has been very different, and failures were numerous. On May 12, 1893, for instance, seven banks in Indiana, five in Michigan, and three in Ohio closed their doors. One failure often led to several; but panics necessarily remove the inflated concerns, and business is better for their absence.

Trusts. The formation of "trusts" still continues in many industries, and the inutility of the Anti-Trust Law of 1890 is constantly demonstrated, most notably, perhaps, by a recent decision rendered by the United States Circuit Court. A deal was made in 1892 by which the three great sugar refineries of Philadelphia, viz., Spreckle's, E. C. Knight's, and the Franklin's, as was predicted in the annual report for this Consular District for the year 1891, entered the Sugar Trust, which was thereby capitalised at 15,000,000 dol. The Government entered a complaint against this deal, but it was dismissed on the specific plea that the purchase of the Philadelphia refineries by the Sugar Trust was not a contract, combination, or conspiracy to restrain trade or commerce, or monopolise either, among the several States or with foreign nations. The decision was subsequently confirmed by the higher court. Other important trusts which have been recently, or are now, in existence, are the Glass, the Steel, the Cordage, the Iron Ore, the Bread, the Leather, and the Cork Trust.

Trusts are formed with various objects, the aim being money-making, but the methods different. Some, by avoiding competition, endeavour to maintain prices; others build up a vast business and then form a company, estimate the factories at many times their value, and sell to outsiders, often foreigners. The history of these great syndicates is usually the same. Sometimes the original owners make the profit; sometimes the promoters, who buy to sell again; but it is almost always the purchasers who lose. Prudent persons will realise that if profits are large the original owners are not going to sacrifice; and that industries

which have paid a large dividend on a small capital cannot do so proportionately on a larger one; and that frequently the supply of raw material in the immediate neighbourhood, or whatever else has contributed to their unusual profits, may have become exhausted. A protective tariff, prohibiting foreign importation and foreign competition, is conducive to the formation and success of trusts.

Insurance.

The question of insurance is one which constantly agitates the community. The losses of the past year have been especially heavy, and in view of the depression of business insurance companies are apt to think that during such periods sufficient care is not always paid to the prevention of such accidents. The companies claim to have many grievances, a chief one being the method of taxation. They claim that it is not fair to tax their premiums, but that the losses should be deducted before the tax is imposed. They support their theory with considerable reason, and urge that as the merchant's credit depends considerably upon insurance, the companies should be encouraged as public benefactors rather than oppressed by legislators. In 1892 the total receipts from premiums by the stock companies of the United States were 3,479,559*l.*, while their expenses, including losses, were 3,465,051*l.*, leaving to the shareholders, who furnish the guarantee in the underwriting business, only 14,508*l.*, a proportion wholly inadequate to the risk. But, examining figures, it is found the fire losses were 63 per cent. only of the premium receipts, leaving the apparently sufficient margin of 37 per cent. for a purely clerical business. But 681,852*l.* was paid for commissions, about 20 per cent. of the money paid for fire and marine insurance premiums. It is argued, therefore, that if persons requiring insurance realised the advantage of so doing, also had fuller confidence in the reliability of the company, a reduction of rates might be made, in proportion to a decrease of commission no longer necessary to induce the insurance solicitor to exercise his eloquence. Life insurance is different, and an increase of business is generally due to the persistence and persuasiveness of the solicitor. An increase of rates, however, has been made by the companies; electric wires in a building are considered dangerous, for instance; glass houses are charged an extra 2*s.* on every 20*l.*; and many persons in Pittsburg have had their natural gas cut off, and have resorted to coal to avoid an extra charge of 1*s.* per 25*l.*

Railways.

The years 1892 and 1893 were not satisfactory to the railroad interests of the United States. The receivers appointed during those years represent 19 per cent. of the mileage and nearly 16 per cent. of the capital stock and bonds of all the railroads in the country. Since January 1, 1893, receivers have been appointed for 71 roads, an outstanding bonded indebtedness of almost 150,800,000*l.*, and capital stock aggregating over 106,800,000*l.*, making a total of almost 257,600,000*l.* of stocks and bonds, from which all returns are suspended, and of which a large part of the value has permanently disappeared. This is more than double the

number of roads, mileage, or capitalisation of any previous year since 1884.

Railroad construction in 1893 was also the smallest for many years. The country is not yet by any means supplied with all needed railways. Many hundreds of practical lines have been projected, and will eventually be built, but the panic of last July put a sudden stop to a number of lines on which work had been actively progressing, and caused serious delay in others, so that the end of the year found many unfinished lines on which much work has been done, and leaves the total of new mileage less than for any 12 months in the last 17 years. The records show that the new main track laid in the United States in 1893 aggregates 2,630 miles on 222 lines in 43 of the States and territories.

The summary for the different States is as follows :—

TRACK Laid in the Year 1893.

State.	Number of Lines.	Number of Miles.
Alabama	5	46
Arizona	1	42
Arkansas	6	36·51
California	9	64·57
Colorado	4	26·65
Florida	9	211·70
Georgia	7	173
Idaho	1	5·56
Illinois	7	78·59
Indiana	5	22·60
Iowa	1	4
Kansas	1	18·39
Kentucky	5	26·15
Louisiana	5	29·35
Maine	4	115·40
Maryland	1	2
Massachusetts	1	1·63
Michigan	4	61·83
Minnesota	8	86·46
Mississippi	2	9·50
Missouri	7	139·99
Montana	1	27·50
Nebraska	2	32·70
N. Hampshire	1	1
New Jersey	1	1·12
New Mexico	1	2·53
New York	8	36·14
North Carolina	9	78·55
North Dakotah	2	194·61
Ohio	7	146
Oregon	1	10
Pennsylvania	45	398·84
Rhode Island	1	5·21
South Carolina	1	14
South Dakotah	4	92·46
Tennessee	5	18·66
Texas	10	166·47
Utah	3	19·57
Virginia	5	16·61
Washington	2	41·90
West Virginia	15	93·81
Wisconsin	4	26·50
Wyoming	1	3·90
Total in 43 States and Territories	222	2,629·99

There has therefore been more construction in Pennsylvania than in any other State, namely, 398·84 miles, while Florida is second with 211·70 miles. Ohio, also in this Consular District, has the good proportion of 146 miles.

The new mileage of 1893 is less by about 1,500 miles than that of either of the two preceding years. But in the four hard years from 1874 to 1877 inclusive the additions were still less, going as low as to 1,111 in 1875. In 1888 the high total of 12,900 miles of new track was reached, but in the following year it fell off

50 per cent. In 1892, 5,092 miles of track were laid, and in 1891, 4,010 miles.

The reports of the Department of Internal Affairs of the State of Pennsylvania for the year ended June 30, 1893, show that the total number of passengers carried during that year was 152,460,840 as against 140,190,599 for the preceding year. The number of passengers carried for 1 mile was 2,895,112,855, an increase of 216,868,231 as compared with the previous year. The figures of last year as compared with those of 5 years ago show a large increase, the number of passengers carried at that time being 99,346,822.

From the returns made to the Inter-State Commerce Commission for the year 1892, the total number of passengers carried was 560,958,211 as against 531,183,988 in 1891. The same returns indicate that the number of passengers carried per mile in the United States was 13,362,898,299 as against 12,844,243,381 for 1891. From these figures it appears that the roads reporting to the Pennsylvania Department of Internal Affairs have 27 per cent. of the entire passenger traffic of the country, and 22 per cent. of the passengers carried 1 mile. In respect to the greatest total mileage the order of the States is Illinois, 10,427 miles; Pennsylvania, second with 9,558 miles; and Texas, third with 9,206 miles.

The Pennsylvania Railroad during the year 1892 had an increase both in its freight and passenger traffic, but owing to lower average rates being received the increase in revenue was not as large. Freight business increased 4,620,527 tons or 7 per cent. The average earnings per ton per mile decreased 5 per cent.; and average expenses were reduced less than one per cent. The total passenger business increased 1,837,845 or 4 per cent. in the number of passengers carried; and 6 per cent. in the number of passengers carried 1 mile. Average earnings per passenger per mile decreased 4 per cent., and average expenses decreased 1 per cent., thus decreasing average profits per passenger per mile 12 per cent. The gross earnings and the expenses of the component parts of this railroad system for 1892 were as follows:—Gross earnings of the Pennsylania Railroad Division from all sources 8,471,908*l.* and expenses 5,711,742*l.*, being a decrease in net earnings as compared with 1891 of 205,117*l.* Gross earnings of the United Railroads of New Jersey 3,728,470*l.* and the operating expenses 2,955,522*l.*, a decrease compared with 1891 of 37,623*l.* Gross earnings from the Philadelphia and Erie Railroad Division 1,496,129*l.* and operating expenses 1,025,940*l.*, a decrease of 41,446*l.*; being a total decrease on the whole system of 281,186*l.* during that period. The Pennsylvania Railroad directors, however, in May, 1893, declared a semi-annual dividend of 2½ per cent. in cash and 2 per cent. in stock. This was the first time since 1868 that the company has declared an extra dividend, that is without increasing its capital stock, the assigned reason being that owing to the general financial situation it appeared a good time to divide a portion of the surplus earnings of the company among the stockholders. In

November, 1893, a semi-annual dividend of 2½ per cent. was also declared. The annual report of the Pennsylvania Railroad for 1893 makes a statement that the gross earnings of all its lines east and west of Pittsburg for that year were 27,011,957*l.*; operating expenses, 19,098,312*l.*; and net earnings, 7,913,645*l.* In earning this there were 135,514,388 tons of freight moved, and 85,152,089 passengers carried.

The Pennsylvania Railroad may generally be credited with a willingness to adopt improvements, and to examine for that purpose new, and even European, systems. In consequence of a report of a committee appointed to examine into the various systems in vogue, both in this country and in Europe, for erecting telegraph wires that will not break so frequently and cause the serious inconvenience to traffic which such accidents occasion, new poles and wires are being erected. The wires are placed as near the ground as possible, and the two pole lines are being used, erected in a cone or letter "A" shape, one forming a brace for the other. Greater care is being taken in insulation and experiments are being made with copper and steel wires, which it is thought will have more resistant power, and otherwise be better for the service. The Electro-Pneumatic Automatic Block System has been introduced on the Pennsylvania Railroad between Philadelphia and Holmesburg, and was put into operation last October. It is said to be working with perfect satisfaction, and to be a great success. The principle of the system is that signals are thrown to the danger position automatically by a train entering the block which the signal controls, and are returned automatically to the position indicating that the tract is clear as soon as the train leaves the block. When there is any failure in the operation of the automatic apparatus, the home signal inevitably assumes, through the action of gravity, the danger position. The new system is more expensive than the old one, the cost of installation being greater, although the cost of maintenance is less. A good deal of the danger through human fallibility is eliminated. A broken rail, which a tower man would not know anything about, is instantly reported by the signal, as is any other obstruction or interruption. The system has also been introduced on the New York Division from Jersey City to Perth Amboy, and is in operation for 18 miles east of Pittsburg. In Philadelphia, however, the new system operates 16 tracks, while in Jersey City there are only 12 tracks operated.

During the last 6 months of 1893 a period of rigid economy was established by the Pennsylvania Railroad. Construction was practically suspended, even lines to reach new bituminous coal-fields being left in an unfinished state, and numbers of persons of all classes were dropped from the pay rolls. In June, for instance, over 1,100 men, chiefly engaged in freight, were laid off between Jersey City and Philadelphia, thus reducing the month's pay roll by 8,000*l.*

The locomotive equipment of the Pennsylvania Railroad system consists of 1,699 locomotives. The passenger carriages number

1,680, the "freight cars" 39,139, and with maintenance-of-way-car equipment, the total number of "cars" amounts to 43,820. In addition to these there are 41,300 "freight cars" owned by others in use on lines of the company. During the year there were 120 carriages added to the passenger equipment. The cost of a first class railway carriage, or "car" as it is here termed, is over 800*l.*, of which about 240*l.* is expended in labour.

A severe blow was inflicted upon Philadelphia when the Philadelphia and Reading Railroad, failing to receive as it is said needed financial support, passed into the hands of receivers in the spring of 1893. The vicissitudes of this railroad have been extraordinary, and its history is memorable for its succession of financial disasters. Philadelphia, however, for a year previous to the last catastrophe had been indulging in a dream of success which was not an improbable vision. When Mr. McLeod became President in 1890 he found the railroad bankrupt, merely a local road, and voiceless in the general direction of railway traffic; its lines were in dilapidation, its equipment discreditable, its motive power inadequate, and its terminal facilities antiquated. He obtained for it direct communication with the lakes, so that western wheat might be brought direct to this port and not diverted to Baltimore or New York; terminals in Philadelphia, in the business centres of the city, and passenger facilities opening up a new suburban world; terminals in New York that would have extended metropolitan commerce; a direct communication with New England meaning new coal markets, independent connection southward through the Cumberland Valley to the Potomac; increased facilities for shipping coal from Philadelphia (concerning which fuller information is given under the heading of "anthracite and bituminous coal"); and better equipment of the road in all respects. It was a system considered to be logically worked out, based upon existing conditions, in no way violating the laws of railway growth; a management sagacious and heroic, that promised most beneficent results. He proposed, in fact, to give to Philadelphia what she needed, another trunk line to compete with and assist the overtaxed Pennsylvania Railroad in the development of the city's manufacture, trade, and commerce. But he erred in the faith he reposed in those who had the power to give him success and equal power to crush him, the financial powers. The proposed combination touched upon someone's "territory," all the forces of finance were arrayed against it, and it surrendered, but the fact of that surrender will never efface from the minds of the people what it was proposed to do for Philadelphia, and the grand attempt to convert a bankrupt local line into a trunk line established on a firm and profitable basis. The financing necessary to accomplish such an object has been severely criticised in some quarters, but its chief fault, a fatal one, seems to have been that it did not succeed.

In May, 1893, the receivers endeavoured to reorganize the system, and to prevent the dissolution of the leases held by the Philadelphia and Reading Railroad Company; besides which it must be borne in mind that the company has an old and valuable

charter which allows it to hold coal lands and do other things forbidden by the more recent constitution of Pennsylvania. A new company would necessarily forfeit these old charter rights. Financiers who a few months before had failed to see sufficient security in the collaterals offered to justify them in loaning 1,000,000*l.*, became willing to act as guarantors for a much larger amount, and a plan was promulgated making provision for funding the local indebtedness and providing an adequate working capital, thus giving the property 5 years in which to recuperate. This was to be done by issuing bonds bearing 6 per cent. interest at a discount; but the interest upon the new bonds was much less than the previous cost of carrying the floating debt. The stockholders and holders of the general mortgage bonds, not having given their consent in sufficient proportion by June 21, 1893, the plan was abandoned. The cause of the failure is attributed to the bonds held in New York, as a large proportion of those held in Philadelphia and London were deposited.

During the summer months the various leased lines resumed their independence, and the great Reading combination was practically ended. The consolidation of 5,583 miles of railroad, under one management, with a capital of 102,200,000*l.*, earning 11,400,000*l.* annually, employing 84,000 persons, conveying 40,000,000 of passengers, moving 50,000,000 tons of freight of which about half was anthracite coal, is a dream of the past, and its "dangers to society," and its "grasping profits" have proved equally baseless. More than that, the Lehigh Valley Company, which had been so important to the combination, has since entered into a traffic alliance with the New York, Newhaven and Hartford Railroad Company, the great and so far successful rival of the New York and New England, thereby securing for the Lehigh Valley an entrance into New England and new coal markets, attaining the object of interchange of traffic which Mr. McLeod had in view for the Reading Combine viâ the New York and New England; so that the struggle for control which commenced when the Reading invaded the Vanderbilt-Morgan territory is still in progress.

The annual report for the Philadelphia and Reading Railroad Company for the fiscal year ended June 30, 1893, placed the bonded indebtedness of the company at 32,536,471*l.*, to which may be added car trust obligations of 556,400*l.* or a total funded indebtedness of 33,092,871*l.* In addition to this the current liabilities of the Board were about 1,400,000*l.* The total freights revenue for the year was 6,928,104*l.*, and its passenger earnings 1,411,346*l.* The income from other sources was 29,100*l.*, making a total of 8,368,650*l.*

The receivers are endeavouring to make arrangements for the payment of liabilities and also of those loans for which a higher rate of interest is being paid than would appear necessary. They have announced that they will confine their business to the management of the remaining property, and that they feel no further acquisitions of railroads or mining properties should be

contemplated in the near future. The interests of the railroad are closely allied with those of the Coal and Iron Company, and its earnings are very large in proportion to its receipts, but it is overweighted by interest charges and the Coal and Iron Company. The latter shows a business of 9,600,000*l.*, the greater part of which originates within the State of Pennsylvania, and nearly all the millions of dollars expended in conducting it are distributed in that State. The deficit for the two companies, for the year ending November 30, 1893, was 160,468*l.*, as compared with profits for 1892 of 135,524*l.* After the appointment of a receivership, when the accounts were made up as of February 28, 1893, it was found that the cash liabilities of the two companies were 1,985,674*l.* in excess of the cash assets. This excess of liabilities was unavoidably increased by more than 200,000*l.* during the first 5 months of the receivership; but at the close of the fiscal year had been reduced (estimated) to an excess of cash liabilities over cash assets of 1,644,446*l.* There would appear no reason why, with careful management, the Reading Railroad should not have a profitable future before it, although it will be merely as a local, and chiefly as a coal carrying line. Its suburban business should also be developed. There are rich mineral deposits along the line of the railroad. Among those most recently developed being the silica industry. A large market exists for glass sand in Eastern Pennsylvania, and this is the only deposit of the material in the State east of the Susquehanna River. Owing to the presence of iron in the deposit it has not been possible to utilise it heretofore, but quite recently a process has been discovered whereby this can readily be eliminated and the objection to its use removed.

The matter of mineral deposits along the line of the Reading Railroad has recently received careful investigation, and a remarkable variety and quantity of them is shown to exist. The coal deposits are well known. One of the largest deposits of magnetic iron ore in the world is worked at Lebanon, and extensive beds of the same mineral are worked in other neighbourhoods. Talc, or soapstone, has been worked for nearly a century in quarries near Lafayette Station. Native gold has been found at the base of Mount Penn, near Hampden, and the same precious metal found in feruginous quartz at the same place, has caused extensive discussion among geologists. Silver is found at the Pequea mines, Lancaster County, and at the Wheatley Mine, near Phœnixville. Copper is found at points in Montgomery County, on the main line of the road. Azurite, or a blue carbonate of copper, and pure copper ores are found at Cornwall, Lebanon County; Fritz Island, near Reading; at the Jones Mine, near Springfield, Berks County; and at the Perkiomen Mine, near Shannonville, Montgomery County. Cerrussite, or carbonate of lead (white lead ore), is mined in Chester County, at the Ecton Mine and Phœnixville Lead Mines, and also in Lancaster County. Zinc is mined at Friedensburg, Lehigh County, and also in Lancaster County. Slate in immense deposits is found in the neighbourhood of Slatington, and the working of the quarries forms an important industry, the pro-

duct being shipped to many parts of the world. Common limestone exists in great abundance at many points along the line of the Reading system in nearly every county in Eastern Pennsylvania, and near Williamsport a handsome quality of black limestone is produced. Marble is quarried at various points on the Norristown, Chester Valley and Lebanon Valley branches, and granite of a splendid quality, as strong and capable of taking as high a polish as the best New England product, is found in various localities in Berks and Chester Counties. A very good sandstone for building purposes is found in large quantities in Reinholds, Mainville, and Hummelstown, the product of the quarries of the latter place being famous and very much sought for. Graphite is found in Bucks County, the mine having been worked for upwards of 100 years. Feldspar is mined at Seisholtzville. Mica is found in Chester County, near Phœnixville, and at other points along the main line of the road, and along the North Penn Division. Kaolin is dug near Douglasville, and large deposits of it are found in other parts of Bucks County, in the southern part of which corundum is also found. Asbestos is another useful mineral produced along the line of the Reading, and in the Long Swamp District, near Reading, are found extensive deposits of mineral paint, yellow and red ochre, suitable for kalsomining and other purposes, as well as at points along the East Penn Railroad, near Alburtis. Besides the minerals already mentioned, most of which are produced in paying quantities, there exists a great variety of less important minerals.

The Lehigh Valley Railroad appears to have never been in a better position to mine and carry coal than it is at present. The Inter-State Commerce Commissioners gave the floating debt of the Lehigh Valley Railroad, June 30, 1890, at 1,759,300*l.* In the 3 years since 1890 this railroad has secured and improved terminal facilities in New York Harbour, opened its through line to Buffalo and extended its facilities in many directions notably into the New England markets, reference to which has already been made in connection with its severance of its lease to the Reading Railroad. Amicable arrangements have also been entered into between the Lehigh Valley and the Pennsylvania Railroad, similar to that which had existed previous to the "Reading deal," and the two roads agreed to work in harmony from January 1, 1894, wherever they meet. While, moreover, its directors in March last reduced its rental to 5 per cent., they announced that its net earnings had been increased 200,000*l.* in the year ending November 30, 1892, one of the few fortunate instances on record in which the opening of a new through line brought an immediate increase in net earnings. Serious differences existed for some time between the Lehigh Valley Railroad Company and the individual coal operators, as to the continuance of the coal prices and tonnage. A fund was necessary to carry on this agreement, and the railroad proposed that the individual operators should raise 400,000*l.*, for which they were to receive Lehigh Coal Company's 5 per cent. gold bonds, principal and interest guaranteed by the Railroad Company. This amount was raised on October 12, 1893, and the threatened general rush to

sell coal was averted. In November, 1893, a general strike of the employés of the railroad took place and lasted some few days, causing great loss and uneasiness. It arose from the action of the President, who refused to recognise the labour organisations of the men employed, though stating his willingness to listen to their complaints as individuals. The questions, however, were settled by arbitration, and most of the men were re-employed. Owing, however, to the enormous losses sustained by the company, arising from damage to locomotives, to cars, to freight in wrecks, while operated by inexperienced men temporarily employed, to perishable freight by delay and other causes, it was determined to pass the January dividend. The October, 1893, dividend was also passed, and that of April, 1894.

The annual report of the Lehigh Valley Railroad for the year ending November 30, 1893, shows that the gross receipts were 3,722,155*l.*, the expenses 2,541,072*l.*, and the net earnings 1,181,083*l.* Adding 72,646*l.* income from investments makes the total income 1,253,729*l.* Of this was expended 940,447*l.* interest, &c., and 203,268*l.* for the dividends paid in April and July, 1893, leaving 110,014*l.* surplus. The company carried 16,775,242 tons of coal and freight, and 6,306,039 passengers, being an increase over the previous year of 248,757 tons, and 287,590 passengers, but the haul was shorter for the freight, resulting in a decrease of the tonnage, mileage, and rate of freight earned. The net loss from the strike in November is estimated at 90,000*l.* The company now has 8,088,262*l.* capital, and 6,786,200*l.* mortgage debt, a total of 14,874,462*l.*, and its guarantees of bonds and stock of affiliated companies are 9,680,000*l.* The total mileage of the Lehigh Valley System is 1,023. It shipped 11,477,630 tons of anthracite coal, and 345,830 tons of bituminous in 1893. Of this 4,966,477 tons were shipped by the Lehigh Valley Coal Company, over one-third of the latter being from the company's own collieries, and the remainder shipped by its tenants. The floating debt at the close of the year, without deduction for cash on hand, was 774,000*l.*, a portion of the issue of Lehigh Valley Coal Company bonds being used for collaterals. Much of this has since been paid off by the sale of these bonds and the surplus earnings.

Street railways.

Electric railways appear to be the method that is being most generally adopted for locomotion through the streets of cities, and numerous franchises have been granted to such railways in Philadelphia during the past year. Some of the roads are already in satisfactory operation, and others are in course of erection, the trolley system of overhead wires being the one selected. The franchises are granted in exchange for contracts concerning the paving of the streets through which the electric railway pass. But not only in Philadelphia, but all over the country the increase in electric railways has been something enormous. Three years ago the mileage of horse tramcar roads was 5,713; of electric roads, 1,641; of steam roads, 554; and of cable roads, 527. Now the electric roads lead all others with a total in excess of 7,000 miles, while the horse-car roads have fallen below 5,000 miles,

the cable roads have reached 1,000 miles, and the steam lines in cities have not materially increased. The cost of building a mile of cable road in a big city is put usually by engineers at 12,000*l.* An electric road costs about 3,600*l.* per mile. The cost of operating horse-car and steam street railways is about the same per mile. The cost of operating cable and electric roads is about one-half of it. Electric roads are 10 per cent. cheaper to operate than cable roads, and their cost of construction is 60 per cent. less.

A great scheme, which is said to have passed the chimerical stage, is to connect Philadelphia and New York by an electric railroad. The accomplishment of this proposal is, however, not likely at present, although there seems little doubt that before the close of another year many of the smaller towns en route may be so connected, and thus gradually a through electric railroad will be completed.

Accidents.

The following paragraphs from the annual report for the year ending June 30, 1893, of the Secretary of Internal Affairs for the State of Pennsylvania demand attention:—

"As Pennsylvanians we feel a commendable pride in the superiority of our railways and railway service, which is strikingly emphasised when our American lines are compared with those of Europe, or indeed with any foreign country. In nearly all the particulars we are far in the lead, but, unfortunately, in regard to the prevention of accident we are badly deficient.

"The returns to this department show that the total number of passengers killed during the year in this State was 79, as against 42 for the previous year; the number injured 779, as against 658, making 1 killed out of every 1,929,884, and 1 injured out of every 195,713. The returns for last year show that 1 was killed out of every 3,337,871 carried, and 7 injured out of every 213,005. Of the employés 650 were killed, and 8,848 injured, as against 495 killed and 6,833 injured the previous year. Fatalities to other persons, not passengers or employés, many of whom were trespassers, resulted in the death of 1,099, and the injury of 1,495, as against 952 killed and 1,329 injured the previous year. The aggregate of killed is 1,828, and of injured 11,122, as against 1,489 killed and 8,820 injured the previous year. They show 10 persons killed and 61 injured for every 100 miles of road operated.

"The returns filed with the Inter-State Commerce Commission of the United States in regard to accidents show that during the year ended June 30, 1892, there were 7,149 persons killed, and 36,652 injured. This, of course, covers nearly all the accidents that occurred throughout the United States, as but few companies fail to make returns to the Commission. It is also shown by these returns that of the number killed 376 were passengers, and 2,554 employés, and of the number injured 3,327 were passengers, and 28,267 employés. Of the number killed 378 met their death while coupling or uncoupling cars, and 10,319 injured.

"Of the passengers, 136 were killed, and 2,860 injured in collisions. In the United States there was 1 employé killed in every 322, and 1 injured in every 29. The returns indicate that

there is a gradual increase in the percentage of accidents among employés."

It is to be regretted that the Secretary does not state the nature of the "superiority" which causes "commendable pride," as these features are evidently more apparent to Americans than to Europeans, but whatever they may be the dangerous pleasure of availing oneself of them naturally arrests attention. The statistics of Great Britain show that in 1892 there were about 900,000,000 passengers carried and 385,626 servants employed on the railroads; that 18,253 miles of railroad were in work, and that the train mileage was 310,579,000; figures sufficiently large for comparison. During that period 21 passengers were killed and 601 injured by accidents to trains, rolling stock, permanent way, &c. (as against 5 killed in 1891, and 108 passengers killed and 747 injured from other causes, such as alighting, or at level crossings; and that 534 servants were killed and 2,915 injured during the year from accidents to trains, or in which the movement of trains or vehicles was concerned. In other words, that the number of passengers killed in Great Britain by accidents to trains was 1 in 41,000,000, and injured from the same cause 1 in 1,438,000; or from all railroad causes 1 passenger in every 6,154,000 was killed; and of the servants 1 in every 722 was killed.

In view of the fact that the rapid diminution and small proportion of accidents in Great Britain is attributed mainly to the compulsory adoption of block and automatic signal systems, it would appear advantageous to enforce similar regulations here, in the hopes of decreasing the very large percentage which is said to be even increasing. The initial cost of establishing such systems is expensive, and, therefore, it seems that nothing but compulsion by law would lead to their being generally applied, as railroad directors appear to consider that the introduction of an improved signal system would cost more than the present amount paid for damages. Further benefit would also probably be attained if more direct legal liability was attached to officials whenever their orders or regulations, such as long hours of service by train or signal men, could be considered reasonably responsible for the occurrence of accidents.

In coal mines the number of fatal accidents in Pennsylvania is officially given as follows for 1892:—

Mines.	Number of Fatal Accidents.
Anthracite	396
Bituminous	133
Total	529

The percentage of fatal and non-fatal accidents for the number employed during the year 1892 in the anthracite and

bituminous regions was larger than during any of the 4 previous years, and was:—

Mines.	Nature of Accident.	Average Number of Employés to each Accident.	Average Number of Tons to each Accident.
Anthracite..	Fatal.. ..	1 to 327	..
Bituminous	,, ...	1 592	..
Anthracite..	Non-fatal ..	1 127	..
Bituminous	,, ..	1 200	..
Anthracite..	Fatal.. ..	..	1 for 5,775
,, ...	,, (1891)..	..	1 10,392
Bituminous	Fatal.. ..	..	1 350,192
Anthracite..	Non-fatal ..	..	1 33,817
Bituminous	,, ..	..	1 118,515

The anthracite mines are much deeper, and in many respects are of a more dangerous character than the bituminous mines. The Shaw gas-testing instrument, concerning which full descriptions have been sent from the consulate in previous reports, still appears to give every satisfaction, and to receive increasing appreciation from various parts of the world where its merits are becoming recognised. The mining districts, both anthracite and bituminous, which have up to this date made reports of accidents for 1893, indicate that there will probably be a slight decrease in the number which occurred during that year.

Philadelphia.

Important improvements are being made in the wharfage and rivers of Philadelphia, which when completed will greatly increase the city's facilities for trade and commerce. The extension of piers and wharves is necessary to accommodate larger vessels, but this could not be undertaken until certain islands in the centre of the river were removed and a deep, broad channel substituted for them. The entire work will cost about 2,000,000*l.*, and is now progressing rapidly and satisfactorily, 2,955,189 cubic yards having been removed. Much more would have been accomplished by this date had not the original contractors failed in their undertaking, necessitating the forfeit of their contract.

An important suggestion is now also under consideration, namely, to connect Philadelphia with tide water by a ship canal across New Jersey, a distance of 75 miles, which is shorter than by the Delaware River. The route proposed is by the Delaware River to Bordentown, New Jersey, then by canal to New Brunswick, a distance of 33¾ miles, and then by the Raritan River Canal to Raritan Bay, an arm of the lower bay of New York.

The water distance from Philadelphia to New York is now 256 miles. The proposed canal would save 181 miles. The cost is estimated at 5,000,000*l.*, and it is calculated that the saving in the cost of the transport of coal would in 8 years pay the cost of

construction. There would also be a saving of the pilotage upon the Delaware Bay and River, and in the prevention of wrecks along the dangerous coast of New Jersey.

The city of Philadelphia is reported never to have been in a better financial condition; its debt is below 7 per cent. of the value of taxable property, the total debt having been decreased at the end of the year 1893 by 154,942*l.* The assessed valuation of property subject to taxation is 153,986,108*l.* Philadelphia is at last getting some well paved streets. During 1893 50·39 miles of streets were paved with sheet asphalt, Belgian blocks, and vitrified bricks, in place of cobble and rubble stones, by the street railway companies, on whom this duty devolves in return for the privileges granted to them. By the city 23·56 miles have been repaved, and 32·39 new streets opened and paved, making the total length of paved streets in the city 821·19 miles, plus 31 miles of macadamised turnpikes. There remains about 290 miles for the street railways, and 450 miles for the city, to repave before all cobblestones are abolished. Several small streets and alleys have been paved with sheet asphalt with a view to cleanliness. The City Gas Works in 1893 made a profit of 291,813*l.*, and have reduced the price to 1 dol. per 1,000 cubic feet, with no rebate for gas used as fuel. On December 31 the city lights were: Gas lamps, 21,797; gasoline lamps, 9,519; electric arc lights, 3,584; an increase during the year of 2,100 lights. The Electrical Bureau has caused many overhead wires to be placed in underground conduits, which are leased to the various companies.

Many extensions and improvements have been made in the city's waterworks. The total number of gallons pumped during the past year was 65,352,736,978 gallons, of which amount 94 per cent. was taken from the Schuylkill River, and the balance from the Delaware River. A new reservoir, with a capacity of 386,000,000 gallons, is being constructed.

The disposal of garbage is still a vexed question. The custom of feeding it to pigs has been discontinued, and all piggeries within the city limits have been removed. A crematory, which is pronounced a success, has been in operation in one district of the city, but it is not yet decided by the authorities whether to erect more or not, as a valuable quantity of fertiliser would thus be destroyed.

The Chief of the Bureau of City Property reported the total receipts for the year 1893 to be 17,597*l.*, which is an increase from every source except the city wharves. The total number of licenses issued was 6,692, revenue 1,084*l.*, an increase over the previous year of 67*4l.* Six public bath-houses were opened from June 12 until September 24, and were visited by 1,106,493 bathers.

The Fire Department reports the total losses on burned buildings as 73,974*l.*, and on contents as 209,418*l.* Some new engines have been bought, and a fire boat.

The Post Office Department has established several new substations, facilitating the delivery of the mail.

In 1892 nearly 5,400,000*l.* were spent in building operations in Philadelphia, which exceeded the figures of 1891 by over 80,000*l.* In 1893 over 4,680,000*l.* were spent, the decrease occurring during the latter part of the year; but the buildings are of a better quality, and there has been less speculative building. The Pennsylvania Railroad has considerably enlarged its train shed, removing the structure erected 12 years ago; the new shed is a fine structure, consisting of six 307-foot spans, the centre height being nearly 150 feet. The ironwork was erected on a traveller moved by donkey engines without interfering with the hundreds of trains which daily enter and leave the station. The clerical staff of the company will shortly occupy the new buildings which are being constructed at the terminus. The Philadelphia and Reading Railroad has also added to the city's useful and ornamental architecture by a commodious and strikingly fine building in the business centre of the city. The City Hall, a massive structure, progresses slowly. Much dissatisfaction has been expressed with the Public Buildings Commission, to whom it had been entrusted. Petitions were presented to the State Legislature stating that the revenues of the city had been injudiciously, extravagantly, and in a large number of instances illegally expended, and the Commission was by law abolished. On appeal the Act was declared invalid by the Courts, and the Commission restored to power. A bronze statue of William Penn, about 37 feet high, is to be erected on the top of the tower, the effect of which will be "great" rather than artistic. The International Bureau of Commerce has moved into an imposing new building. The Philadelphia Bourse has been established, and a building 362 feet long, 132 feet wide, and 145 feet high from the street is being erected. The School of Industrial Art has purchased the Deaf and Dumb Asylum, a very commodious structure on the principal street of the city, and is steadily increasing in usefulness, while remaining steadfast to its first principle, "art applied to industry."

Other Towns.

Pittsburg is situated in the midst of a bituminous coal district which is 50 miles square. It is a great coal-shipping and freight-producing territory. The Carnegie Steel Company is reported to send out 300 cars daily. There is situated the greatest steel plate-glass works in the country, and the most extensive window glass factory. Over one-half of the window glass used here is made in Pittsburg factories. The largest electric manufacturing company and the largest railroad brake manufactory is there. Pittsburg claims to lead the country with its cork industry, its tanneries, its table ware, and its firebrick. The Oil Well Supply Company and the National Tube Works rank highest in that industry; it has an important bridge company and two great shovel manufactories, and 33 national banks to accommodate its business. The tax assessor's list to February 1, 1893, shows

that the Carnegie Steel Company did the largest business; assessment, 1,916,447*l.* Thirty firms did a business of over 200,000*l.*, including another iron and steel company, 1,100,000*l.*; manufactured textiles, 1,000,000*l.*; electric company, 600,000*l.*; wholesale grocer 500,000*l.*, &c. During the period of 1893 none of the banks failed, while the number of important business failures was very light. Many of the industries, however, were closed during the period of general depression.

Johnstown since the flood, which almost wiped it out of existence four years ago, has grown with marvellous rapidity, and the population in and about the city is now 36,000, and many important industries are flourishing.

The Reading Board of Trade makes a favourable annual report for 1893, showing that during the year a number of plants had been enlarged, some fully doubling their capacity, including some 25 or 30 cigar factories, the latter having exceeded their output of 1892 and increased the number of persons employed. Many establishments which had been idle for a brief period had resumed by the end of the year on full time.

Despite the industrial depression that has prevailed throughout the country, the material advancement of the city of Scranton continues unabated; the centre of the tremendous industrial development of all the Lackawanna and Wyoming Valley region, containing a population of over 250,000 workers, its progress is one of the interesting studies of the growth of American cities. Its importance as a railroad centre is scarcely equalled by any city east of the Alleghenies. That Scranton is to become even more important as the business centre of all this busy region is quite apparent from the electric railway development of the last year. It is the magnetic point in an electric railway system, covering a distance of 50 miles north and south, and comprising 80 miles of railway. The cheapness of fuel has been a factor in developing large manufactures, including those of iron and steel. Powdered coal, known as culm, too fine for shipment, has created there, where it is inexhaustible, the cheapest steam power fuel in the world. The cost of steam per horse-power per boiler from anthracite lump coal is estimated at 8 c. (4*d.*) per day; from bituminous, 6 c. (3*d.*); from natural gas when first introduced in Pittsburg, 4 c. (2*d.*); while the cost from culm in Scranton is said to be ½ c. (¼*d.*). This affords the manufacturers and the electric railways using this fuel a very high percentage of profits, and is attracting capital from other cities.

The city of Chester, on the Delaware River, which has been a manufacturing city since 1850, now finds employment for 6,000 workpeople, and well withstood the struggle of 1893. There is not one of the 30 cotton mills now idle, and 178,742 spindles, 3,211 looms, and 325 cards are all in operation, though in several the wages have been reduced. The Eddystone Print Works, which are said to come into direct competition with English goods, have a capacity of 1,125,000 yards of printed cloth per week; they have not stopped, and have not reduced wages. The iron

trade there has been in a very fair condition, and several vessels are on the stocks in the shipyards. Only one plant failed during the year; it had made extensive improvements, and was not prepared for the depression and financial stringency. The plant is now in the hands of a receiver, and is continuing work.

Criminals.

The processes of law are frequently considered too uncertain, and the mob often deals directly with criminals or persons supposed so to be, either by inflicting bodily punishment or torture, for which purpose there are in many districts organised bands of persons, known as "vigilants," "whitecaps," &c., or else by inflicting death known as "lynching" generally by hanging, in which case the body is often afterwards riddled with shot; and sometimes by burning at the stake with the added torture of thrusting hot irons into the body during the process. During the past 10 years the population of the United States has increased 20 per cent., the number of reported murders has increased 500 per cent., and deaths by lynching have exceeded by 50 per cent. the number of legal executions. Only four of the 44 States have ever abolished capital punishment, Maine and Rhode Island in the East, and Michigan and Wisconsin in the West. It was abolished in Michigan, which is in this consular district, about 40 years ago, and since then the average length of imprisonment for homicidal crimes has been 10 years, the sentence being for life; the prisoner usually receiving a pardon from the Governor terminating his life's sentence. The atrocious occurrences of lynching which have occurred in that State caused a general demand for the repeal of the law, and the re-imposition of capital punishment. In Indiana "whitecaps" have been prevalent for some years, and last May a mob of 100 men took a murderer out of gaol and hanged him to a tree in sight of the railroad track, in what was locally described as "in the most orderly manner." Cases of felonious assault are those most frequently punished by lynching, the criminal frequently being a negro. This crime, the victim in many cases being a minor, has been especially prevalent in the neighbourhood of West Chester, Pennsylvania, where no less than eight cases of felonious assault were tried at the Quarter Sessions last August. Such lawlessness and disregard for the processes of law are necessarily deterrent, in localities where they are rife, to the establishment of business enterprises, and the settlement of desirable residents. There was an increase of 2,948 in the number of commitments to the Philadelphia County Prison during 1893 compared with 1892. For all offences in 1892 there were 20,241 males, and 2,220 females; total, 22,461. In 1893 there were 22,901 males committed, and 2,408 females, total 25,309. During the recent period of poverty there have been numerous cases of burglary, and many women have had purses snatched from their hands in broad daylight on frequented streets, with more or less violence. A new prison is being built of larger dimension situated at Holmesburg, owing to the overcrowded condition of the county gaol.

Liquor licenses.

No important change has been made lately in the liquor laws of this consular district. The High License Law prevails in Penn-

sylvania, but opinions as to its success by officials of various towns are entirely at variance. In Philadelphia the arrests for drunkenness have decreased since the Act went into effect in 1888. There were 246 more licenses granted in that city in 1893 than 1892. An anti-adulteration measure, passed by the Legislature, requiring that beer and ale should be made wholly of hops and barley was vetoed by the Governor of Pennsylvania.

In Michigan the "tax system" is practised, each retailer paying 100*l.* into the County Treasury. There is also a local option law by counties in that State.

In Ohio a law has been in effect since 1888 by which retailers pay 50*l.* into the County Treasury.

There appear to be no available statistics demonstrating the effects of the liquor laws in increasing or decreasing the crime of drunkenness.

Legislation.

Among the labour bills which have become law recently in Pennsylvania are the following:—

An Act to amend that of 1889, to regulate the employment and provide for the safety of women and children in mercantile industries and manufacturing establishments, and to provide for the appointment of inspectors to enforce the same.

An Act making Saturday a legal half-holiday, and appointing holidays and half-holidays.

An Act defining fraternal, beneficial and relief societies, authorising them to pay benefits, &c., and collect dues, &c., providing for their registration in the office of the Insurance Commissioner, and exempting them from taxation and from the supervision of the Insurance Commissioner.

An Act to protect the life and limbs of those employed in the construction of new buildings.

An Act authorising corporations to pension employés who have become infirm or disabled after long and faithful service.

An Act to establish boards of arbitration to settle all questions of wages and other matters of variance between capital and labour (practically a re-enactment of the existing law).

An Act securing to mechanics, journeymen and labourers the right to file liens against real estate for the amount of wages due for work or labour done in and about the erection and construction thereof.

A wise and important law provides for the registration of births and deaths throughout the rural districts of the State; and another provides for the relief of needy sick, injured, and in case of death, burial of indigent persons whose legal place of settlement is unknown.

Further amendments have been made to the ballot law, with a view to securing greater secrecy.

In Michigan a bill extending full municipal suffrage to women

has become law. It passed the House of Representatives by 57 to 25, and the Senate by 18 to 11.

In Ohio a man was sent to the penitentiary for life "for stealing three chickens." The law in that State, attempting to rid society once and for all of professional criminals, provides a life sentence for prisoners convicted for the third time of penitentiary offences. This man had served a term for assault with intent to rob, and a second term for receiving stolen goods. Chicken stealing was his third offence.

A law has been passed in Pennsylvania which enlarges the powers of married women in acquiring and disposing of property.

Nineteen States have created commissions to act together in framing a uniform marriage code for all the States. The necessity for this is often exemplified. A case in point occurred last summer, when a Philadelphian went to Ohio and obtained a divorce, his wife being still a resident of Philadelphia. Returning he married a Philadelphian widow. Subsequently the first wife denied the legality of the decree of divorce, on the ground that she had received no notice of proceedings. The Ohio courts did not support her contention and the divorce was maintained. The first wife appealed in the Pennsylvania courts for support from her "husband." The Pennsylvania court did not regard the Ohio divorce as valid in Pennsylvania, and ordered the "husband to pay 5 dol. a week for the support of his wife." Thus the man found himself possessed of two legal wives, whom he was bound to support, and with whom he was legally entitled to live. The judge gave as his opinion that he could not be prosecuted for bigamy in Pennsylvania, as the deed was not committed in that State; and could not in Ohio as there the marriage was legal, as the divorce was granted there; and that it is possible for a man to have divorced wives in various States, that are only considered legal in those States, and yet not be liable for polygamy.

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UNITED STATES.

REPORT FOR THE YEAR 1893

ON THE

TRADE, &c., OF THE CONSULAR DISTRICT OF CHARLESTON (WITH PLAN).

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1203.

Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.

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UNITED STATES.

CHARLESTON.

Consul Rawson-Walker to the Earl of Kimberley.

My Lord, *Charleston, May* 14, 1894.

I HAVE the honour to transmit, herewith enclosed, Annual Trade Reports for Charleston and District for the past year of 1893.

I have, &c.
(Signed) E. H. RAWSON-WALKER.

Report on the Trade and Commerce of the Consular District of Charleston for the Year 1893.

ABSTRACT of Contents.

	PAGE
General trade	1
Manufactures	4
Finances	6
Railways	8
Shipping and navigation	10
Charleston harbour (with plan)	11
Cotton	11–13
Phosphates and fertilisers	20
Naval stores and lumber	28
Rice trade	31
Miscellaneous	36
Brunswick Vice-Consulate	36

General Trade.

The returns for the business year of 1892–93 show that there was a considerable falling-off in the aggregate trade of Charleston as compared with the previous season; the same condition of affairs, however, appears to have generally prevailed elsewhere, and the best authorities agree in the opinion that the year 1893 was, in respect to its trade and business, perhaps the worst ever General trade.

experienced in the history of the United States. The commercial agencies of Bradstreets and R. G. Dun and Co., whose reputations for accuracy stand very high in business circles, and whose opinions are based on careful inquiries extending all over the country, declare that last year was the most disastrous, and the losses sustained more severe than for the past 50 years. There were 50 per cent. more failures during 1893 than in 1892, and the liabilities were 400 per cent. larger. 75 railway companies, representing a capital of 1,651,000,000 dol. (333,000,000*l.*), went into the hands of receivers, and bank clearances were 12 per cent less than in 1892. The business depression was not confined either to this port or this country, similar unfavourable conditions having prevailed, in a greater or less degree, in nearly every country throughout the civilised world.

In view of the generally depressed state of trade elsewhere, it is perhaps not very remarkable that the business of Charleston and of South Carolina should have suffered somewhat, although a comparison of the decrease here as compared with other surrounding towns is, on the whole, less discouraging in reality than in appearance, and the situation at the close of the season, although not bright, is nevertheless not altogether without encouraging features; but it must be admitted that the condition of the Carolina farmers is perhaps little better than at the beginning of the year; as a rule, they are as much involved in debt now as they were a year ago on account of short crops and low prices, and, having been unable in many cases to make ends meet, much hardship will doubtless be experienced before another crop can be made and marketed.

The manufacturing industries of the State had a fairly prosperous year, none of them having been forced to cease operations on account of trade depression, and there was an increased demand for their goods. With one or two small exceptions there were no bank failures in the State; the principal crops were produced at less expense than for many previous seasons, and there was an appreciable decrease in the business done in lien loans and mortgages on farmers' crops; trade also appears to have gotten more down towards a cash basis than was formerly the case. Labour is in abundant supply, and the number of the unemployed does not seem to be greater than can be provided for by the ordinary resources of the community. The public health has been generally good, and the courage of the people, which was subjected to exceptionally severe tests last year from destructive storms and depressed trade, is buoyed up and in a measure sustained by a knowledge that present misfortunes are not altogether local in their nature, and also by a belief that there is reasonable ground for hoping, as the year closes, for improved trade conditions next season, in view of the fact that the widespread financial panic of 1893 has spent its force, and that there is a general brightening of the business outlook all over the country.

The resources of the port of Charleston underwent exception-

ally great trials during the past year, and, on the whole, they have stood them well. Those who are familiar with the unfavourable conditions prevailing throughout the whole business world are aware that, while in many towns banks were failing, mills closing, furnace fires dying out, and the army of the unemployed begging for bread in the streets, business institutions here gave proof of their stability and strength by the success with which they passed through the trying period; factories and mills at this place kept running on full time, banks met all claims on them, and furnace fires were kept blazing.

The total value of the trade of this port during the commercial year ending August 31, 1893, according to official reports, was 75,126,899 dol. (15,025,379*l.*), being a decrease of 8,778,498 dol. (1,755,699*l.*) as compared with the aggregate business of the previous year. The loss in the value of cotton receipts was 5,570,020 dol. (1,114,004*l.*); cotton goods, domestics, &c., 489,918 dol. (97,983*l.*); crude phosphate rock, 5,000,000 dol. (1,000,000*l.*); and grocery trade, 145,510 dol. (29,102*l.*). The above-mentioned decrease in the value of cotton and cotton goods was due principally to such natural causes as over-production and lower prices; in naval stores to the gradual exhaustion of the yellow pine forests in this section which has made the business in turpentine, resin, and tar a steadily decreasing one at Charleston for the past several years; but losses in the phosphate and grocery trade were, to a great extent, due to political causes and unfavourable legislation in regard to tax assessments, state royalties, railway rates, and liquor laws. While, however, Charleston's trade shows a falling-off in the directions named, there was, on the other hand, an increase of 431,000 dol. (86,200*l.*) in the fruit and vegetable business; 70,167 dol. (14,033*l.*) in lumber; 566,000 dol. (113,200*l.*) in manufactures; and 1,883,538 dol. (376,707*l.*) in fertilisers.

In addition to the above-mentioned losses and gains it may be mentioned that during last August Charleston was visited by probably the worst storm that has ever occurred here within the memory of any living person, causing 1,000,000 dol. worth of damages to wharves, warehouses, dwellings, and other property in the town; fortunately, however, most of these damages were covered by storm insurance policies, enabling owners to promptly repair injuries and to rebuild property destroyed. So vigorously, indeed, was the work of repair prosecuted and accomplished that the docks, warehouses, and cotton presses were in readiness to handle the new crop as soon as the staple commenced to come in, the opening of the new cotton season following closely upon the heels of the storm.

The evil effects of the hurricane were also hurtful in other respects to this port, inasmuch as it destroyed the trade with some of the best customers Charleston had along the Carolina coast and in the interior of the State.

The business reviews of many other towns of the south and west show that the relative decrease in the volume of trade was quite as large, or even larger, the past season than at this place, as,

for instance, New Orleans, the principal American cotton port, where the total trade of the year shows a falling-off of 95,000,000 dol. (19,000,000*l.*). Disastrous panics also occurred in several other neighbouring towns and business centres, and in a number of instances resort was had to very unsound devices in order that business might be kept moving. At Charleston there was no panic whatever, and no change was made in the customary financial methods of doing business, although there was a scarcity of money during the summer months, and interest on loans was high and exchange rates very low for a time, but on September 1, when the new business season opened, the banks here had deposits on hand of over 500,000 dol. (100,000*l.*) in excess of the corresponding period the year before. The ability displayed in successfully confronting and surmounting the unusual difficulties experienced last year speak highly for Charleston's business conservatism, recuperative energy, and commercial strength, and it also shows that with her present excellent terminal facilities, deep water harbour, and other advantages, she possesses the power to command future success.

Manufactures.

Manufactures.

There was a gratifying increase last year in the output of the manufacturing establishments, notwithstanding the last two years of business depression that seems to have reached its culminating point during the closing months of the season, and has tended to injuriously affect many forms of manufacturing business and industrial enterprise, Charleston's industries have so far weathered the storm satisfactorily, and held their own in the face of the adverse circumstances, and, as the year closes, the general prosperity in manufacturing circles is reported as unimpaired.

The trade in commercial fertilisers, upon which the business of this port largely depends, was somewhat better than during the previous year, and prices were higher. But owing to the almost universal sale by cotton planters of their cotton seed to the oil mills, fertiliser manufacturing companies were obliged to purchase more largely than before of ammoniated goods in order to supply the deficiency of cotton seed, which has heretofore been so important an item in the preparation of compost on the farms.

The prices of the various chemicals, such as potash, soda, nitrate, muriate, &c., used in the manufacture of commercial fertilisers, are still high, but they show a slight decrease below the ruling figures of a year ago. As the demand for ammoniated goods was heavier than usual during the past year, there was a corresponding increase in the value of the annual product of 188,000 dol. (37,600*l.*), the result of the year having been 4,867,000 dol. (973,400*l.*) worth of ammoniated goods produced in 1893 compared with 4,679,000 dol. (535,800*l.*) in 1892. The transfer of the Meade property to the Reade Fertiliser Mills will add to the product next year. The cost of producing manufactured

fertilisers the past season was less than ever before, owing to the greater economy resulting from the use of pyrites in place of brimstone for making sulphuric acid.

The Charleston Cotton Mill did a fairly prosperous business, and up to the close of the season had no orders cancelled, the value of the annual product showing a slight increase. The prices of shirtings and sheetings are about ¼ per cent. higher than the year before, but yarns are dull and lower with very little demand.

The barrel manufacturing business has about kept its head above water, but Georgia competition has increased, and prices for barrels have been considerably reduced. The Ventilated Barrel Company succumbed to the hard times, leaving the field now in possession of the Tide-water and Palmer Barrel Manufacturing Companies.

The ice factories did a good business notwithstanding the very low rates for manufactured ice that prevailed early in the season, and the value of the year's product was somewhat increased. The Charleston Ice Manufacturing Company has now a daily capacity of 75 tons, and the Palmetto Brewery ice plant 25 tons. During the months of July and August the quotations per ton for ice advanced from 2 dol. to 6 dol.

The bag manufacturing enterprise, consisting of the Royal Bag Factory and Leiding's Bag Factory, has managed to realise a fair margin of profit during the season, although prices for their goods were lower, and increased difficulties were experienced in making collections.

The Charleston Bagging Company also did a good business, the output being about 1,000,000 yards in excess of the year before, but prices ruled 1 c. per yard cheaper.

The Mutual Cotton-seed Oil Refinery shared in the general prosperity of the cotton-seed oil business last year. The total value of the annual product was 300,000 dol. (60,000*l.*), compared with 140,000 dol. (28,000*l.*) for the year before.

The Charleston Lead Company in its second season had a fairly satisfactory year, the product amounting to 125,000 dol. (25,000*l.*), as compared with 75,000 dol. (15;000*l.*) for 1892.

The Fernoline Chemical Works did a moderately paying business, and turned out a product valued at 265,000 dol. (53,000*l.*).

The Electric Light and Power Company increased its capital from 50,000 dol. (10,000*l.*) to 100,000 dol. (20,000*l.*), and moved into its handsome new quarters, having now a thoroughly equipped electric plant that will compare favourably with any similar establishment of the kind in the country.

The Charleston Gas Light Company had a good year, and, notwithstanding the competition of the Electric Light Company, has made considerable important additions to its equipment.

The Palmetto Brewing Company also enjoyed a very good business from January 1 to the beginning of July, when the new State Dispensary Liquor Laws went into effect, and it is believed that this enterprise will continue to be one of Charleston's successful industries, as the State authorities have made arrangements to

continue the business of the company which is now carried on under the control and direction of the State officers.

The above are only a few of Charleston's principal manufacturing industries. There are numerous others of less importance that have stood the test of years of experience, and which have done fairly well during the past very trying year, as the tables contained in the following pages will show, and on the whole the result is encouraging in view of the general prevailing depression.

Wholesale trade.

The wholesale trade of Charleston had to contend with several serious drawbacks during the past season, the first of which was the collapse in the price of cotton in the beginning of the year, a natural consequence resulting from the enormous crop of 9,000,000 bales of the staple produced, the largest ever made in the United States by 1,000,000 bales or more. The decline in cotton values had a most injurious effect on the wholesale trade, not only here but throughout all the cotton States. Planters were in many cases unable to meet obligations for last year's supplies of food, clothing, and farm implements, and were not in a position to make contracts for necessaries required during the coming season.

The New South Carolina Liquor or Dispensary Law, that went into operation on July 1, 1893, also had a harmful effect on the wholesale trade, inasmuch as the law in question prohibited private parties from dealing in spirits, wines, beer, &c., the State authorities only permitting the lawful sale of alcoholic liquors through its own appointed agents or dispensers, as they are called. One result of this law, which has had an important bearing on wholesale trade, has been the withdrawal from this State of a considerable amount of capital formerly invested here in the wholesale liquor business, the dealers being compelled either to remove their establishments to other States (which many have done) or retire from the business altogether.

Unfavourable railway legislation also proved a drawback to the wholesale trade, the railways being hampered and interfered with in the matter of freight rates, taxation, &c. Discriminating rates in favour of other ports also took away a considerable amount of cotton from Charleston last season that, under ordinary conditions, should have come to this port and aided indirectly to swell the value of the year's wholesale trade.

Notwithstanding, however, all of these untoward conditions, a comparison with other ports will show that Charleston has made a tolerably good fight, and, while a decrease took place in most branches of wholesale trade, it is noted that in the majority of cases the decrease was not very great, and in some lines there was a decided improvement both as to the actual volume of business done and prices realised.

Financial situation.

The financial situation, which had been very bad during the spring and summer months, began to gradually improve as the autumn season approached; returning confidence was shown by the re-opening of numerous banks and mills that had temporarily suspended; there were increased deposits in the savings institutions; and the general situation was materially improved by the

practical means of relief employed by bankers, and the action taken by the National Congress indicating an early repeal of the Sherman Silver Bill by both the Senate and the House. It has been observed that, from the past financial history of this country, severe revulsions or panics may be expected to occur at intervals of about every 10 years, very similar to the storms that, in physical nature, periodically occur every 8 or 10 years along the South Atlantic coasts of the United States, long periods of comparative quiet and peace appearing to generate the elements which compose the violent hurricanes that form in the West Indies, and, moving northward, impinge upon these coasts at the above-named intervals, sometimes with appalling loss of life and property. So in the financial world it is found that a continuous series of poor crops, or a widespread desire to realise upon assets after a long period of extended credits, pave the way for what are commonly known as panics, which, although they might ultimately prove in some respects salutary in their effects, are nevertheless extremely hurtful by reason of the feeling of unreasonable distrust and fear inseparably connected with them, causing great shrinkage in values, and forcing many actually solvent persons to suspend payments. It is well understood, however, that the money crisis experienced here during the past year was brought about mainly by the fact that England, the great banking centre of the world, having sustained heavy losses in South America and Australia, had become apprehensive that the operation of the Sherman Law would eventually bring the United States to a silver standard; she therefore disposed heavily of her American securities of all kinds in this market, thus drawing large quantities of gold from America. Another cause also was the uncertainty existing as to future changes in the tariff laws likely to be made by Congress, causing manufacturers to make their output as small as possible until the question is finally settled. It was evident, however, as the year closed that, although the financial prospect was brightening for the country at large, the causes of the stringency were so varied and serious that the process of recovery would necessarily be slow, and must be patiently waited for; but owing to the fact that at Charleston conservative estimates had always been placed upon the value of property situated here, there was fortunately no appreciable diminution in values, and no important failures occurred throughout the year. Indeed, during the whole of last year's financial disturbances, Charleston maintained an exceptionally strong stand; her capital proved to be sufficient for the ordinary carrying-on of business; and although the issuing of "clearing-house certificates," as a temporary substitute to relieve the want of money, was a course generally resorted to elsewhere, the banks here were in a strong enough position to meet all demands upon them with coin and currency, the fact having been established by actual research, as before stated, that the amount of deposits in the banks of Charleston on September 3, 1893, was in the aggregate over 500,000 dol. more than on the corresponding date in 1892. Large sums were invested in this market last year

in stocks and bonds, and heavy investments of money were also made in the different securities dealt in by the local brokers and dealers.

There were, however, considerable fluctuations from time to time in the prices of many favourite securities, owing, perhaps, to causes not of a general nature, but the leading stocks and bonds that command public confidence maintained a relatively normal value. The rate of interest for money ruled high during the latter part of the year, and while good investments in bonds did not pay more than 5 per cent., money was in demand for loans at from 7 per cent. to 8 per cent. The city credit stands high notwithstanding the year's depressing influences, and Charleston bonds were eagerly sought for by investors, large amounts having found their way to the principal money centres of the north.

Railways.

Railways. No material change has taken place in the general railway situation since last year's report. The South Carolina Railway, Charleston's main business artery and feeder, still remains at the end of the year in the hands of the Courts, being ably managed, as it has been for the past 3 or 4 years, by Receiver D. H. Chamberlain, appointed by the United States District Court. The general impression seems to be that when the road is eventually sold and its affairs finally settled, it is almost a foregone conclusion that it will be bought, leased, or in some way controlled by one of the great railway systems leading to the west. At the present time, indications appear to point to the Louisville and Nashville Railway as being most likely to own or control this road in the future. The sale of the road has been fixed by the courts for April 12, 1894, but it is a matter of some doubt as to whether it will take place on the day named or another postponement be added to the numerous ones already made, at the instance of bondholders and other interested parties, in regard to the sale of this property. Two years ago much inconvenience and loss was experienced by the inability of the railways centering here to afford adequate traffic facilities for promptly handling the heavy cotton crop that came to market with such a rush in the autumn of 1891. The roads became blockaded, traffic was congested, and numbers of British and other foreign vessels were placed on demurrage before they could obtain cargoes. No difficulties of this kind were encountered last year, considerable additions and improvements having been made to the roads, they are now amply provided with means to handle a larger amount of business than ever before presented to them, and there is little likelihood of traffic blockades occurring again in the future. The railways entering Charleston have never been in better working order than at the present time; they are managed with skill and ability, but it is to the great granary of the West that Charleston must look for the traffic which is necessary for the fullest development of the trade and resources

of this port. The traffic returns of the different railways for the last year show that while the business was not so good as the previous season, nevertheless it may be considered fairly satisfactory on the whole when due regard is had for the unfortunate business depression that prevailed, together with the financial stringency and unfavourable railway legislation with which the roads had to contend. The figures given compare very favourably with most other roads in this section of the country during the same period. The West Shore Terminal Railway, which was established as a spur or feeder on the west side of the town by the South Carolina management, has proved by the traffic last year to be a very important addition to the South Carolina Railway system.

The trade over the West Shore line consisted principally of salt, sulphur, pyrites, fertilisers, lumber, cross ties (railway sleepers), and a general assortment of building material. The overhead arrangements for loading and discharging cargoes are complete, and the capacity for handling materials in bulk is now claimed to be equal to that of any port on the South Atlantic Coast.

During the storm of last August, shipping found shelter and protection at the excellent and commodious wharves of the West Shore Company, which remained intact and ready for business after the hurricane was over.

The North-Eastern Railway Company spent large sums of money in roadway and other improvements in connection with their terminal tracks and wharves. The additions made to its equipment, and the liberal policy displayed in the adoption of new and improved appliances has enabled this road to attain greater despatch and regularity in the transport and delivery of shipments in connection with its large and increasing business. The docks of the Company, situated on Cooper River, have been greatly improved, and their position enables shipping loading or unloading there to be easily accessible from all parts of the town.

The East Shore Terminal Company has also completed arrangements that greatly facilitate communication in transferring freights between ships taking or discharging cargoes at wharves on the eastern side of the town and the different railway termini leading to or from Charleston. Railway cars now come directly alongside of ships, and when loaded are forwarded to any part of the country without breaking bulk or changing wheels, as formerly, owing to the principal American railways having now adopted a standard uniform gauge of 4 feet 8½ inches for their tracks instead of the 5 feet gauge in general use on southern railways until the change to a uniform standard was made a few years ago.

The Charleston and Savannah Railway, which forms one of the connecting links of the through mail highway along the Atlantic Coast of the United States between the Northern States, Florida, and the West Indies, only did a fair business last year. Freights showed a considerable falling-off owing to the low prices resulting from the excessively large crop of cotton of 1891, the bad crop of 1892, and the disturbances of credit and financial embarrassments

of last season. Fortunately, however, although there was a very great decrease in the cotton business, other branches of traffic maintained something like normal proportions; the tourist and excursion season was tolerably good, the extremely cold weather having induced many persons from northern sections to seek winter homes in the milder climate of Florida, and, moreover, the period of Lent last year, having extended into April, large numbers of wealthy and fashionable Americans visited Florida also, greatly benefiting railways and winter resort hotels. In addition to this, the Charleston and Savannah Railway derived much benefit from the movement northward of early fruits and vegetables grown in Florida, South-west Georgia, and points in South Carolina tributary to the road. The Youngs Island Branch Railway, connecting the main line with the Sea Islands along the Carolina coast, has given a stimulus to the cultivation of vegetables in that section, that is shown by the steady growth of this business from year to year; the interests so developed appearing to give promise of renewed life for the Sea Islands along the southern coast which were once the pride of the State, and from which Charleston formerly derived much substantial advantage and prosperity.

Shipping, &c.

Shipping, &c.

The total number of vessels of all nationalities (excepting those under 100 tons) arriving at Charleston last year, 1893, were 774, with a net tonnage of 799,211 tons, compared with 839 arrivals for the year before, with a tonnage of 859,992 tons. The annual return of British shipping, however, for 1893 (which will be found under the head of shipping and navigation) shows that, while the total arrivals for all nations indicate a decrease, there was nevertheless a marked increase last year both in the number and tonnage of British vessels coming to Charleston; the average carrying capacity, tonnage, and draught of water having been greater than ever before recorded in the history of the port.

The increased depth of water now on Charleston bar has enabled charterers of late to bring larger ships with deeper draught to the docks here during the past autumn than has before been possible. During 1893 the entries of British ships (mostly steamers) numbered 69, with a tonnage of 89,326 tons, in comparison with 51 arrivals in 1892 of 61,247 tons, thus showing an increase in British ships in favour of last year of 18 vessels and 28,079 tons. Up to a year ago the usual size of vessels taking cargoes of cotton at this port were 5,000 bales to 6,000 bales capacity each, drawing about 17½ feet of water, but during the last few months 9,000 to 10,000 bale cargoes have been cleared, and proceeded to sea without any difficulty in crossing the bar with draughts of 19½ feet. There was also a noteworthy absence the past season of demurrage claims on account of the inability of charterers to obtain cotton in time to load ships according to terms of charter party. Very much inconvenience

and loss of time and money was sustained by numbers of British ships during the autumn months of 1892 from this cause in cases where suits for damages for breach of contract were fruitless owing to the absence of financial resources on the part of charterers.

Cotton Fires.

Cotton fires.

With one comparatively trifling exception there were no cotton fires on British vessels at Charleston during the year 1893. A small fire occurred on board the steamship "Glenloig," on October 10 last, while the ship was loading cotton at her dock for Bremen. The fire was easily controlled, however, and the damage done confined to a few bales in the fore peak compartment of the ship. 3 years have now passed since the last serious cotton fire on ship-board at this port, the record in this respect being in pleasing contrast with the alarming frequency with which these fires occurred some 4 or 5 years ago.

The improved harbour facilities now afforded have resulted also in a conspicuous absence of the vexatious delays in loaded ships getting to sea, which were so often experienced heretofore, and the unavoidable groundings, thumpings, and bumpings which most loaded vessels of 17 feet, or more, draught had to encounter in crossing Charleston bar would appear now to be, happily, a thing of the past.

Charleston Bar.

Deep water on Charleston bar.

Probably, however, the most important and interesting feature in this year's review of Charleston's trade resources is an account of the work done on the jetties, and particularly the gratifying results obtained during the past six months for deepening the water on the bar, results calculated to aid materially in the development of the trade and commerce of this port and the wide area of country tributary thereto. The chief obstacle heretofore existing to this development has been the narrow barrier of sand known as Charleston bar lying at the mouth of the harbour, reducing the depth of the channel entrance into the harbour, from deep water without to deep water within, to figures that scarcely admitted a passage way for vessels drawing over 17 feet or 17½ feet of water. Owing, however, to the engineering skill that planned and built the jetties, two long walls of stone 100 feet wide at the base, extending out from either side of the harbour to the bar, and to the liberal action of the United States Government in supporting the labours of the engineer directing the work with adequate appropriations of money, a remarkable and gratifying improvement has taken place, the results achieved within the last 6 months being particularly worthy of notice, and likely to interest the shipping world. From official surveys and reports of the progress of the work of deepening the bar by the engineers in charge the following figures are taken, and, in order

that a clearer understanding may be had of the jetty improvements, attention is at the same time directed to a plan or map of Charleston harbour improvements accompanying this report. In June, 1892, the best continuous mean high-water channel that could be obtained through the jetties was 15 feet. Three months later this was increased 1 foot; two months later, in November, a narrow 19-foot opening had been cut by the combined action of dredging and the scouring effect of the confined out-flowing tides. At the end of 12 months, in June, 1893, a good navigable channel was reported 20 feet deep at mean high-water. In December, 1893, this had been increased to 21 feet, and at the date of the preparation of this report, March 31, 1894, it is officially stated that there is a clear channel way now over Charleston bar of 22 feet 4 inches at ordinary high-water, which on spring tides would give about 23 feet 4 inches, with a possible 6 inches to 1 foot more in the event of spring tides and stiff easterly winds happening to occur at the same time. The officials in charge of the jetties are of opinion that there is a reasonable probability that, perhaps, within the next year 25 feet to 26 feet will be obtained, 26 feet being the depth originally calculated on by the engineers who first designed the system of jetties at this port.

Much of the recent success obtained is due to the River and Harbour Bill passed by Congress and approved by the President July 13, 1892, appropriating over 2,000,000 dol. (400,000*l.*) for harbour improvements at Charleston, and providing for continuous work on the same until completed, thus rendering a successful prosecution of the operations more feasible than was possible under the former plan of intermittent and insufficient appropriations, involving uncertainty and interruptions to the work, and losses of results gained during temporary suspensions of labour. Great advantage was also derived under the recent law which enabled the officials to make a single contract for completing of the work, Government pledging itself to provide funds for the continuance of the operations until the jetties were finished. As a result of the large sums paid out, the railways were induced to provide better facilities in the way of cars and special trains for carrying rock from the quarries—130 miles distant to the docks—for the jetty work; contractors being sure of steady employment, enlarged their plants, and the rate of progress was 60 per cent. better than before, with the result as already mentioned in the effects produced during recent months in improving the bar. During the past year, for the first time, a good navigable channel has been afforded between the jetties, suitable for the accommodation of a larger class of vessels than have heretofore been able to enter this port; and Charleston now possesses a better depth of water to the ocean than she has ever before enjoyed.

The Lighthouse Department of the Government has provided the new channel with suitable lights; and through this passage-way most of the shipping now enter and leave this port. It is expected that the position of the light-ship now anchored off Rattlesnake Shoals will soon be removed to a point directly oppo-

FORT MOULTRIE

SULLIVAN

ISLA

N

Fort Sumter

MORRIS ISLAND

(325. 7/94. 1793)

Harrison & Sons Lith.

IMPROVING HARBOUR

AT

CHARLESTON S.C.,

UNDER THE DIRECTION OF

CAPTAIN FREDERIC V. ABBOT,

CORPS OF ENGINEERS U.S.A.

JAMES P. ALLEN,

ASSISTANT ENGINEER.

SCALE OF FEET.

Ft 1000 0 1000 2000 feet.

N D

A T L A N T I C

O C E A N.

NORTH JETTY.

14330 FEET LONG.

New Jetty Channel entrance to Charleston Harbour.

March 31st. 1897.
(22 1/3)
22 1/3 feet at ordinary high water.
23 1/3 feet on spring tides.
(23 1/3)

SOUTH JETTY.

18440 FEET LONG.

Martins Lane. W.C

site the jetty entrance, and 4 miles nearer to the same; and vessels approaching this port will then have, by keeping the light-ship, Fort Sumter and St. Phillip's church steeple in range, a straight-away channel from the sea to the city almost as direct as the crow flies, an advantage said to be found at no other port in this country.

Fuller details with respect to the different branches of Charleston's principal departments of trade during the past year will be found under their respective headings in the following pages.

Cotton.

Cotton. Notwithstanding the excellent facilities now possessed by Charleston for handling and shipping cotton, there was a heavy falling-off in the receipts of the staple at this port during the season of 1892–93, owing partly to the short crop produced, partly to discriminating railway rates in operation, and also to several other causes below mentioned.

The receipts of all classes of cotton during the year ending August 31, 1893, were 306,449 bales, compared with 511,273 bales the preceding year, showing a decrease of about 40 per cent. in the receipts of the year just closed; a falling-off so serious in its proportions that it may be well to consider the causes leading to this result. The territory lying within a radius of 100 miles of Charleston, which has heretofore been almost exclusively controlled by this market, is now partly occupied by competing ports, and much of the cotton trade was for this reason diverted to other points.

After making due allowance for the comparative failure in the yield of last year's cotton crop, which had an unfavourable effect on receipts at all the ports, but more especially those situated on the Atlantic coast, it was apparent that an important cause of the decrease here was the discrimination in railway rates against Charleston by the combination of rival railway systems and syndicates, whose interests were antagonist to this port, and in close sympathy with competing points situated on either side thereof. Railways built by Charleston capital and owned hitherto here have been absorbed by parties having interests elsewhere, and whose best efforts were inimical to this place and directed to the building up of rival ports. It appears plain that so long as the railways in the State are owned or controlled by those whose interests are not identical with Charleston, that her cotton business must be seriously handicapped, notwithstanding the fact that she is now in a position to offer advantages second to none on this coast, that the bar now affords ample water accommodation to float ships of 10,000 bales of cotton capacity or more, and that her railways are now able to bring produce from the interior of the country directly along the ship's side without breaking bulk or entailing additional expense.

Another cause to which the decrease in the cotton receipts

last year is partly attributable, was a certain amount of prejudice that appears to have been created among the farmers against this market by the efforts of the politicians who, in order to further their own individual interest, have sought to array one section of the State against another, to the injury of this port. The outlook at the end of the cotton year indicated that, notwithstanding an increased acreage, the yield of the growing crop, nearly ready for market, would not be equal to last year; with the probability, therefore, of better prices prevailing as the season advanced.

For almost a year the cotton business has suffered from the financial stringency, dull trade, and marked depression in almost every department of industrial affairs, but, with the removal of these causes, the opinion was widely entertained that a general improvement would likely take place, and that cotton, the great staple of the south, would soon command better prices.

The receipts of cotton at Charleston during the past 25 years, were as follows:—

Cotton receipts.

TABLE showing the Receipts of Cotton at Charleston during the Past 25 Years.

Years.	Quantity.
	Bales.
1870–71	250,761
1871–72	356,544
1872–73	386,128
1873–74	438,713
1874–75	419,947
1875–76	396,812
1876–77	455,677
1877–78	429,292
1878–79	502,995
1880–81	625,187
1881–82	502,394
1882–83	568,207
1883–84	428,301
1884–85	512,039
1885–86	505,168
1886–87	400,346
1887–88	450,068
1888–89	416,490
1889–90	349,828
1890–91	557,744
1891–92	511,293
1892–93	306,449

Comparative Exports of upland Cotton.

Exports.

The comparative exports of uplands from this port from September 1, 1892, to August 31, 1893, inclusive, and also for the same period during 1891–92 were:—

FOREIGN EXPORTS.

Places Exported to.	Quantity.	
	1892–93.	1891–92.
	Bales.	Bales.
Liverpool	83,410	158,102
Havre	7,537	5,550
Continental ports	122,956	184,632
Total	213,903	348,284

COASTWISE EXPORTS, &c.

Place.	Quantity.	
	1892–93.	1891–92.
	Bales.	Bales.
New York	72,201	129,365
Interior, by rail	3,854	430
Total	76,055	129,795

GRAND TOTAL.

	Quantity.	
	1892–93.	1891–92.
	Bales.	Bales.
Grand total of foreign and coastwise	289,958	478,079

Prices for Uplands.

The prices quoted for middling upland cotton at Charleston on the first of each month during the past year were as follows:— Prices for uplands.

Prices.

Date.	Middling per Lb.
	Cents.
September 2, 1892..	6⅝
October 7, 1892	7
November 4, 1892..	7
December 2, 1892..	9
January 6, 1893	9⅛
February 3, 1893	9¼
March 3, 1893	9
April 7, 1893	8
May 5, 1893	7½
June 2, 1893	7
July 7, 1893	7⅜
August 4, 1893	7⅜
September 1, 1893..	6⅛

Sea Island Cotton.

Sea Islands.

Under the prospect of a smaller crop the market for Sea Island cotton, for the season of 1892–93, opened in September, 1892, with quotations of 17½ c. per lb. for fine Floridas, and in October 21 c. was quoted for medium fine Carolinas.

The market then advanced steadily until early in December when 25 c. was paid for fine Floridas and 28 c. for medium fine Carolinas. From this time on through January, 1893, there was a very light demand, and prices gradually declined until the end of February, when fine Floridas sold for 19 c. and medium fine Carolinas brought 25 c., the market advancing again in April to 20 c. for fine Floridas with very little change taking place in values from that time until the close of the season at the end of August.

New crop.

Up to August 26, 1893, there was a very good prospect that the new crop would be slightly in excess of the previous year, but the storm along the Carolina coast, on August 27, is estimated to have destroyed from one-third to one-half of the Carolina crop, while the Georgia crop showed considerable damage from rust and exhaustion of vitality of the plants. The Florida crop, however, gave promise of a somewhat larger yield than for the year before, although in some other respects the conditions were less favourable.

The Sea Island cotton crop of the United States is produced on the low sandy islands skirting the Atlantic coast of Carolina, Georgia, and Florida, the climate and soil being adapted only on these islands for the production of the beautiful long silky staple, of which this grade of cotton is composed, and which has commanded, at one time since the American Civil War, as high a price as 1 dol. per lb.

Receipts, Exports, and Stocks.

Receipts, exports, &c.

The receipts, exports, and stock of Carolina, Georgia, and

Florida, Sea Island cotton during 1892–93 at Charleston, as compared with the same time in 1891–92, was as follows :—

RECEIPTS.

	Quantity.	
	1892-93.	1891-92.
	Bales.	Bales.
Carolinas	5,824	9,219
Georgias and Floridas	6	31
Stock on hand, September 1, 1892	119	564
Total	5,949	9,814

EXPORTS.

	Quantity.	
	1892–93.	1891–92.
	Bales.	Bales.
Sea Islands, exported	5,527	9,664
Stock—Carolinas	416	119
Georgias and Floridas	6	30
Total	5,949	9,813

COMPARATIVE EXPORTS.

To—	Quantity.	
	1892-93.	1891-92.
	Bales.	Bales.
Liverpool	3,299	2,557
Havre	352	241
New York	1,876	6,896
Total	5,527	9,694

Total Crop of Sea Islands.

The following comparative statements show the total extent of the crops of 1892–93 and 1891–92, also the total exports and their destination as well as the stocks on hand at Charleston and Savannah, the two principal American Sea Island cotton markets :— Total crop.

RECEIPTS OF CAROLINAS.

Receipts at—	Quantity.	
	1892–93.	1891–92.
	Bales.	Bales.
Charleston	5,824	9,218
Savannah	1,375	2,286
Total	7,199	11,504

RECEIPT OF GEORGIA AND FLORIDAS.

Receipts at—	Quantity.	
	1892–93.	1891–92.
	Bales.	Bales.
Charleston	6	31
Savannah	24,404	39,798
Fernandina	2,525	4,113
Jacksonville	121	330
Brunswick	726	3,456
Total	27,782	47,728

GRAND TOTAL.

	Quantity.	
	1892–93.	1891–92.
	Bales.	Bales.
Grand total of crop	49,981	59,232

Supplementary Cotton Trade from September 1 to December 31, 1893.

Supplementary.

The total receipts of cotton of all classes at Charleston from September 1 to December 31, 1893, amounted to 336,858 bales in comparison with 205,257 bales during the same period of the year before, showing an increase in the receipts the past year of 130,601 bales in excess of the corresponding 4 months of the preceding year.

The total exports during the same time were 256,433 bales for the last 4 months compared with 205,257 bales for the same in 1892, leaving a stock on hand and on ship-board at the close of the past year of 80,425 bales, in comparison with 45,532 bales on hand for the corresponding date 1 year ago.

Sea Islands.

The total receipts of Sea Islands from September 1 to December 31, 1893, were 1,840 bales, compared with 5,656 bales for the same time the year before, and the exports were 1,243 bales last year and 3,782 bales in 1892, leaving a stock on hand and ship-board, including stock brought over from the previous season, of 1,033 bales, compared with 1,990 bales for the year before. Sea Islands.

COMPARATIVE Exports of Sea Islands and Uplands from September 1, 1893, to December 31, 1893.

FOREIGN.

To—	1893.		1892.	
	Sea Islands.	Uplands.	Sea Islands.	Uplands.
	Bales.	Bales.	Bales.	Bales.
Liverpool	166	93,002	1,202	75,107
Havre	..	11,175	..	7,900
Continental ports ..	..	101,904	949	70,743
Total	166	206,081	2,151	153,750

DOMESTIC.

To—	1893.		1892.	
	Sea Islands.	Uplands.	Sea Islands.	Uplands.
	Bales.	Bales.	Bales.	Bales.
New York	1,077	50,352	1,631	51,507

GRAND TOTAL.

	1893.		1892.	
	Sea Islands.	Uplands.	Sea Islands.	Uplands.
	Bales.	Bales.	Bales.	Bales.
Grand total ..	1,243	256,433	3,782	205,257

Closing Prices.

At the close of the year 1893 the tone of the cotton market was quiet and steady with a fair demand, the ruling quotations for good middling upland cotton were 7⅝ c. per lb., and for Sea Island medium fine 20 c. to 22 c. per lb.; fine 30 c. to 35 c. per lb.; extra fine, 40 c. to 50 c. per lb. Price.

Phosphates and Fertilisers.

On the opening of the season of 1892–93 there were many discouraging features prevailing in the business of manufacturing fertilisers; trade for the year before had been dull, having fallen-off in the aggregate about 70,000 tons, and the market showed very little animation up to the end of December.

Early in January, 1893, however, business improved greatly, and during January, February, March, and April the shipments of fertilisers were so heavy as to cause a good deal of astonishment both here and abroad. There were good reasons that accounted for this; Charleston was well equipped for the business, the fertiliser factories being excellently situated with deep water and railway facilities convenient. Crude phosphate rock is easily obtained from the mines, and manufacturers now use the less expensive pyrites instead of sulphur for making acid, thus enabling them to make commercial manures as cheaply as they can be produced elsewhere; that this can be done being shown by the fact that nearly the whole output of the 14 or 15 fertiliser factories at Charleston last year was sold and shipped.

Up to within a few years ago this was an essentially agricultural section of country, having few other industries besides cotton planting, with the exception of some small interests in gold mining in the upper mountain districts of the State, and for a long time agriculture was almost confined to the production of cotton, and even up to the present time the principal crop continues to be cotton, although quantities of rice, sugar-cane, tobacco, and grain are now added to the yearly product. The cotton crop of the Southern States has kept pace with other advances made in this country, last year's total crop of about 8,000,000 bales being estimated as having a money value of 325,000,000 dol. (65,000,000*l.*), in addition to which 25,000,000 dol. (5,000,000*l.*) more was realised from the manufacture and sale of cotton-seed, cotton-seed meal, cotton-seed oil, and oil-cake.

There are now 20,000,000 acres of land annually planted with cotton in the Southern States, requiring large quantities of machinery, labour, animals, ploughs, wagons, harness, and food supplies.

It is therefore evident, from the above-mentioned facts, that the extent of the cotton-growing industry is very great, with a wide field for the sale and use of commercial manures, hundreds of thousands of tons being annually required.

It is, perhaps, difficult to say which has made the greater advance—cotton, in its acreage and production, or the output of manufactured fertilisers needed yearly to promote the growth of this staple. 20,000,000 acres in cotton alone is a vast area, but the States now using commercial manures are by no means limited to those growing cotton; they include territory extending from the Atlantic seaboard across the entire south, and some of the grain-growing States in the west are also beginning to use Carolina fertilisers.

The large surplus cotton crop left over year before last made the price of cotton so low that serious apprehensions were felt for the ensuing business season in fertilisers. The fact had been overlooked that this business is a growing one, steadily increasing in volume from year to year, and that it would require widespread stagnation in order to seriously check its growth. The south is, however, very conservative, and its financial condition is, on the whole, substantially good. Large crops of staple articles are yearly produced, cotton manufactures are considerable, and coal mining, coke making, and iron mining and manufacturing are conducted on a large scale.

The timber interests also are immense, and the shipments of lumber and railway cross-ties (sleepers) have been very large.

The investment of millions of dollars in phosphate enterprises in Florida caused some apprehensions last year for fear the Carolina establishments would be injured thereby, but these apprehensions do not appear to have been justified by results, and South Carolina now has 27 phosphate mining companies, two of which, the Coosaw Company and the Charleston Mining Company, have a capital of 1,000,000 dol. each. The Charleston Mining and Manufacturing Company is a land rock concern, and the Coosaw Company dredge their rock from the beds of rivers. Most of the foreign exports of Carolina phosphate rock are shipped from Beaufort, South Carolina, but the principal manufactories for making fertilisers are situated at or near Charleston; indeed, the business of manufacturing fertilisers has grown to such large proportions within the past few years that the importation of commercial manures has practically ceased to be an item in the yearly imports here.

List of Carolina Mining Companies.

The following list includes the names of all the river and land mining phosphate companies in South Carolina, showing the annual capacity of each:— List of mining companies.

Name.	Annual Mining Capacity.
	Tons.
Charleston Mining and Manufacturing Co.	100,000
William Gregg and Co...	15,000
C. C. Pinckney, Junr., and Co.	30,000
Charles H. Drayton and Co.	15,000
Rose Mining Co.	15,000
William L. Bradley and Co.	30,000
St. Andrew's Mines Co.	20,000
Bolton Mines Co.	20,000
Wando Phosphate Co.	15,000
C. O. Campbell and Co.	15,000
E. B. Fishburne and Co.	20,000
Horseshoe Mines Co.	20,000
Meadville Mines Co.	20,000
Mount Holly Mining and Manufacturing Co. ..	15,000
Palmetto Mines..	10,000
Beaufort Phosphate Co.	25,000
Coosaw Co.	135,000
Phosphate Mining Co., Limited	50,000
Farmers Co.	25,000
Bear Swamp Mining Co.	12,000
W. Y. Fripp's Co.	5,000
William's Island Co.	15,000
E. C. Williams and Co.	5,000
Archdale Co.	15,000
Eureka Mine Co.	15,000
Dotterer Mine Co.	15,000
St. Helena Mine Co.	10,000

Foreign and Domestic Shipments of Crude and Ground Rock.

Shipments

The following table will show the shipments of crude and ground phosphate rock from Charleston to foreign ports and domestic points, and also to the west by railway for the years 1891–92 and 1892–93 respectively :—

To—	Quantity.	
	1891–92.	1892–93.
	Tons.	Tons.
Domestic ports and interior by rail	202,340	161,281
Foreign ports	4,396	175
Total	206,736	161,456

Shipments from Beaufort.

Beaufort shipments.

The shipments of Carolina River phosphate rock from Beaufort, South Carolina, were as follows :—

To—	Quantity.	
	1891-92.	1892-93.
	Tons.	Tons.
Foreign ports	120,058	177,893
Domestic ports	30,602	69,230
Interior points by rail	10,000	12,500
Consumed at Beaufort	16,000	15,000
Total	176,660	274,623

Recapitulation.—Total Phosphate Business.

Recapitulation.

The following table shows the extent of the Carolina phosphate rock business for the past two years, together with the total shipments and consumption:—

Carolina Phosphate Rock.

Charleston.

To—	Quantity.	
	1891-92.	1892-93.
	Tons.	Tons.
Foreign ports	4,396	175
Coastwise „	143,627	121,939
Interior points	58,713	39,342
Consumed by fertiliser manufacturers	165,000	155,000
Total	371,736	316,456

Beaufort.

To—	Quantity.	
	1891-92.	1892-93.
	Tons.	Tons.
Foreign ports	120,058	177,893
Coastwise	30,602	96,720
Interior	10,000	12,500
Consumed	16,000	15,000
Total	176,660	302,113

GRAND TOTAL OF CAROLINA PHOSPHATE ROCK.

Shipped and Consumed—	Quantity.	
	1891-92.	1892-93
	Tons.	Tons.
Charleston	371,736	316,456
Beaufort	176,660	302,113
Total	548,396	618,569

Prices for Rock.

Prices.

The prices for phosphate rock at the mines near Charleston on August 31, 1893, were as follows :—

Description.	Per Ton.	
	River Rock.	Land Rock.
	Dol. c.	Dol. c.
Crude rock	3 50	4 00
Hot-air dried	4 00	4 75
Hot-air dried, 60 per cent. guaranteed	4 75	4 75

Phosphate Discoveries.

Recent phosphate discoveries.

The last reported phosphate discoveries are situated in Algiers and Tunis, and they are said to be of considerable extent. These deposits are stated to be some distance away from rail or water communication, and are estimated to contain 15,000,000 tons, analysing from 50 per cent. to 70 per cent. of phosphate lime.

The World's Supply of Phosphate and Guano.

World's phosphate resources.

The yearly sources of supply of the world's most important phosphate and guano mines in comparison with that of the Carolina product is shown by the following table prepared during the past year :—

Name of Country or State.		Average Yearly Product.	How Mainly Disposed of or Shipped.
		Tons.	
Algeria	Phosphates ..	2,500	To Germany
Belgium	„ ..	450,000	To Mons and Liége
France	„ ..	450,000	75 per cent. exported
Canada	Apatites ..	31,000	United States and Europe
Florida	Phosphates ..	200,000	Mostly exported
England	Coprolites ..	30,000	Used at home
Germany	Phosphates ..	50,000	Used locally
Hayti	„ ..	2,000	Sent to the United Kingdom
Mexico	Guano ..	5,000	To Hamburg
Norway	Apatites ..	20,000	To Germany
North Carolina ..	Phosphates ..	7,500	Used locally
Russia	..	75,000	Used locally
South America ..	Peruvian guano ..	60,000	Generally exported
South Carolina. ..	Phosphates ..	600,000	Largely exported

Carolina Fertilisers.

Fertilisers. The following is a list of the South Carolina Fertiliser manufacturing companies:—Ashepoo Fertiliser Co.; Ashley Fertiliser Co.; Atlantic Fertiliser Co.; Berkeley Fertiliser Co.; Baldwin Fertiliser Co.; Chicora Fertiliser Co.; Columbia Fertiliser Co.; Edisto Fertiliser Co.; Etiwan Fertiliser Co.; Greenville Fertiliser Co.; Georgia Chemical Fertiliser Co.; Globe Fertiliser Co.; Imperial Fertiliser Co.; Meadville Fertiliser Co.; Pacific Guano Co.; Piedmont Fertiliser Co. (burned); Port Royal Fertiliser Co.; Royal Fertiliser Co.; Stono Fertiliser Co.; Wando Fertiliser Co.; Wappo Mills Fertiliser Co.; Wilcox, Gibbs, and Co.; Read Fertiliser Co.

Sales of Manufactured Fertilisers.

Sales. The total sales of Carolina manufactured fertilisers during the past business year amounted to 366,618 tons, of which 325,618 tons were sold or shipped from Charleston, and 31,000 tons from Port Royal. During the previous year of 1891–92 the shipments were 214,338 tons from Charleston and 30,000 tons from Port Royal.

Imports of Chemicals, &c.

Chemical imports. The amount and value of chemicals used in the manufacture of fertilisers imported into Charleston during the season of 1892–93 were as follows:—

Articles.	Quantity.	Value.
	Tons.	Dollars.
Kainit	6,907	45,042
Sulphur	4,490	18,518
Muriate potash	1,594	58,231
Pyrites (sulphur)	14,192	40 927
Manure salt	50	1,163
Phosphates	450	2,467
Guano	418	4,180
Brimstone	4,050	97,153
Sulphur potash	75	3,395
Total	2,228	271,076

Supplementary.

Supplementary.

The trade in Carolina phosphate rock and fertilisers during the last 4 months of the past year, that is, from September 1 to December 31, 1893, was as follows:—Shipments from Charleston, 62,673 tons of phosphate rock, and 36,723 tons of fertilisers, which was sent to domestic ports and interior points by rail with the exception of the comparatively trifling amount of 175 tons shipped to foreign countries. The shipments from Beaufort, during the same time, were 41,000 tons of phosphate rock, of which 30,000 tons went to foreign countries, and the remaining 11,000 tons to domestic ports of the United States.

The proportionately small export of Carolina rock, as shown by these figures in comparison with previous years, was owing to the serious injury sustained by the river rock phosphate companies during the August storm of 1893, most of these companies being situated around Beaufort and Port Royal. So disastrous indeed was the storm referred to that most of the river companies were forced to practically suspend operations for several months, and even up to the close of the year only a partial resumption of business had taken place on account of repairs to damaged property and the restoration of plant destroyed not having been completed, although at the opening of the new year of 1894 the prospects were favourable that a full resumption of business would soon take place.

Tennessee Phosphate Beds.

Attention has lately been directed to the phosphate beds of Tennessee, in this consular district, by a paper published on the subject by Dr. F. M. Stafford that appears to be of considerable public interest, and the following observations, which have been taken principally from or suggested by Dr. Stafford's article, may not be uninteresting to British readers in view of the large amount of English capital now invested in Carolina and Florida phosphate industries.

The existence of the Tennessee beds have been known for a

long time, but a knowledge of their phosphatic character is a matter of somewhat recent discovery.

The people of Florida had often pierced the phosphate deposits in their State when they were boring wells for water, and in like manner the Tennesseeans as often pierced their phosphate beds in searching for coal. In both cases the "rock" which was considered so objectionable and denounced as an obstruction and nuisance has since proved to be of incalculable value.

The Tennessee beds are found interstratified with the rocks of the plateau country lying west of the meridian of Nashville and between that place and the Tennessee River. Their geological position is well marked and easily found; they are met with in all the counties within the above-mentioned limits, but they are not everywhere thick or of good enough quality to deserve attention.

In certain favoured regions, however, they occur in large volume, and some of them have been described as "real bonanzas of phosphate rock"; the deposits are divided into two distinct and important beds, one above and one below a stratum known as black shale.

The one above is a bed or layer of concretionary masses, balls, and kidney and knee-shaped forms ranging from the size of walnuts to that of a man's head. These are sometimes loosely disposed in a greenish blue coloured shale, and sometimes thickly packed together like so many cannon balls in a layer 8 inches or 10 inches in thickness, ordinarily the layer is not so thick, being often represented by a few scattered concretions, but thick or thin it is almost universally present, its "kidneys" serving to show the location of the black shale and the underlying bed when these are concealed by débris or soil.

The other phosphate bed, that underlying the shale and the most important of the two, is in its best condition, a well defined continuous stratum of dark bluish or bluish black, rarely greyish, rock with fine or coarse grain; its regularly stratified character making it appear very much like a bed of stove coal, this comparison giving a good idea of the way in which it lies, and also indeed of the manner in which it will have to be mined. The material of which it is composed, when examined under a magnifier, shows points of pyrites; the coarse grained varieties under the same conditions abounding in small seed-like bodies or fragments of a compact phosphate, and also as a rule showing a small spiral and occasionally a fish tooth or fragment of fish bone.

The black shale is rarely absent from its proper place, it contains some bituminous matter and flames up when placed upon live coals very much as a piece of porous brick soaked in coal oil would do; this having led many ill-informed persons to regard the material as the "blossom" of stove coal, and in consequence it has been shafted, tunnelled and pitted in a thousand places in Tennessee in the search for coal supposed to be lying underneath. It is older than coal, however, and lies 1,000 feet below it in the Cumberland mountain formations, the phosphate beds and shale pertaining to the same Devonian period and resting on limestone.

The thickness of the lower bed ranges from a few inches to a little more than 4 feet of good phosphate rock, the full extent, however, of the available deposit has not as yet been ascertained, and a large part of the field remains to be investigated, but it will be thoroughly explored as there are now a large number of prospectors already at work.

As an example of the better phosphate regions, if indeed it is not the best, the Swan Creek Valley, in Hickman and Lewis counties, is mentioned, this deposit being of good quality and averaging not less than 3 feet in thickness with an area 20 miles long by 4 miles in width, making 80 square miles in all. The analysis shows that the deposit contains from 60 to 75 per cent. of bone phosphate. The practical working of the rock has been tested by the National Fertiliser Company of Nashville, Tennessee, and the secretary of that Company states that the rock was found to grind nicely, and that when acidulated or mixed with sulphuric acid it showed a very high per cent. of phosphoric acid, being richer in this respect than they had ever found the South Carolina rock to be, and equal to the highest grades from Florida.

It is a well understood fact, however, that the first accounts of phosphate "finds" are usually the most flattering ones, and the rule may very possibly hold good in this case; but Dr. Stafford's descriptions and estimates do not appear to indicate undue excitement or enthusiasm; and the report of the Fertiliser Company has a business-like air about it that seems to give the subject something more than a mere theoretical interest even at this early stage of the matter.

Naval Stores and Lumber.

Naval stores.

The receipts of naval stores, consisting of resin, turpentine, &c., last year were considerably less than the year before, owing to the growing scarcity of pine trees which are being yearly reduced in number in this section by the steady work on them, and the consequent gradual exhaustion of the pine forests. Prices were fairly good from the first of the year until the beginning of August, when the great stringency in the financial world caused a marked decline in values, spirits of turpentine at that time going down to 22½ c. per gallon, the lowest point reached in many years. Most of the available pine trees in South Carolina have been worked almost continuously for a number of years, and they will soon cease to yield paying quantities of turpentine and resin, and eventually these products will have to be obtained principally from the virgin forests of Georgia, Florida, and Alabama.

Receipts, Exports, and Stock of Naval Stores.

Receipts, export, and stock.

The following comparative statement shows the receipts, exports, and stock at this port for the year ending August 31, 1893, and also for the year before :—

RECEIPTS.

	1892-93.		1891-92.	
	Spirits.	Resin.	Spirits.	Resin.
	Casks.	Barrels.	Casks.	Barrels.
Stock on hand	1,443	15,982	3,282	9,011
Receipts	22,542	121,624	25,969	127,262
Total	23,985	137,606	29,251	136,273

EXPORTS.

To—	1892-93.		1891-92.	
	Spirits.	Resin.	Spirits.	Resin.
	Casks.	Barrels.	Casks.	Barrels.
Rotterdam	4,855	17,418	1,276	12,840
Hamburg	192	24,825	3,397	25,277
Trieste	..	2,523	..	10,337
Glasgow	4,340	5,647	2,105	2,525
Genoa	..	2,235	843	5,781
London	1,970	8,347	1,711	2,060
Liverpool	..	8,110	..	4,500
Naples	720	2,443	..	..
Hull	..	2,689	650	6,030
Harburg	..	3,834	..	2,456
Barcelona	..	414	..	..
Stettin	..	9,609	..	3,500
Newcastle	..	..	150	9,520
Bremen	..	2,857	..	1,668
Antwerp	..	..	1,250	1,823
Lubec	..	..	..	4,000
Malmo	..	..	..	250
Bamling	..	..	..	2,805
Venice	..	2,425	..	..
Cardiff	..	3,063	..	..
Nord Kopping	..	600	..	..
Christiansand	..	2,620	..	..
Europe viâ Savannah ..	..	2,400	..	..
Total foreign exports	12,077	102,059	11,382	95,312

Coastwise Exports.

Coastwise. The coastwise exports of naval stores from September 1, 1892, to September 1, 1893, as compared with the previous year, were :—

To—	1892-93.		1891-92.	
	Spirits.	Resin.	Spirits.	Resin.
	Casks.	Barrels.	Casks.	Barrels.
New York	7,887	26,010	15,150	22,470
Interior points by rail	1,080	50	1,267	..
Total	8,967	26,060	16,417	22,470

Total Receipts.

The receipts of naval stores (including resin and turpentine) during the season of 1892–93 were 144,166 barrels and casks, in comparison with 152,931 for the previous season. Ten years ago the receipts for 1882–83 were 366,471 casks and barrels, showing that during this period there has been a falling-off of 222,285 packages in the yearly business.

Prices.

Prices.

Prices quoted for the leading grades of resin and turpentine on September 1, 1893, were as follows:—

Resin—C, 80 c. per barrel; H, 1 dol.; K, 1 dol. 60 c.; M, 1 dol. 75 c.; N, 2 dol. 60 c.; and for spirits of turpentine, 23¼ c. per gallon.

On December 31, 1893, the quotations for resin were:—C, 95 c.; H, 1 dol. 40 c.; K, 2 dol. 30 c.; M, 3 dol 15 c.; N, 3 dol. 15 c.; window glass, 3 dol. 55 c.; water white, 3 dol. 75 c.; and for turpentine, 26½ c. to 27 c. per gallon.

Supplementary.

The total receipts at Charleston from the opening of the naval stores season, April 1, 1893, to December 31, 1893, were 18,900 casks of turpentine, and 70,172 barrels of resin, compared with 20,707 casks of turpentine and 80,126 barrels of resin received during the same time the year before.

The total exports during the same period were 18,631 casks of turpentine and 64,615 barrels of resin last year in comparison with 20,767 casks of turpentine and 89,126 barrels of resin the year before, leaving a stock on hand and on shipboard at the close of the year 1893 of 1,603 casks of turpentine and 9,615 barrels of resin, compared with 2,556 casks of turpentine and 10,110 barrels of resin on hand the same date the year before.

Of the exports during the above-mentioned period, 5,098 casks of turpentine and 19,408 barrels of resin went coastwise, and 13,533 casks of turpentine and 45,556 barrels of resin were exported to foreign countries, of which latter the shipments to Great Britain were 8,773 casks of turpentine and 9,950 barrels of resin.

Rice Trade.

Rice. During the first part of the harvest the season of 1892–93 was favourable, but in September, 1892, heavy and long-continued rains prevailed, retarding work in the fields, injuring a considerable part of the crop, increasing the cost of production, and in some cases diminishing the expected yield per acre materially. Still, however, results show a larger crop than that of the previous year. The receipts of rice at the South Carolina Mills during the year ending August 31, 1893, were 1,237,479 bushels, while for the year before they were only 971,615 bushels, showing an increase in favour of the past year of 265,864 bushels.

The rice crop, for the same period, of the Atlantic coast plantations was 2,040,344 bushels last year, compared with 1,641,822 bushels the previous year, an increase for the past season of 398,522 bushels. Last season was also a very favourable one to rice planters throughout the Gulf States, the acreage and product being considerably larger than for previous years. The receipts at Louisiana mills are reported at 8,091,784 bushels last season, in comparison with 4,241,807 bushels the year before, an increase of 3,849,977 bushels the past year.

The total rice crop of the United States for last year was 10,132,128 bushels, and for the year before 5,883,629 bushels, showing that the increase for the United States last year was 4,248,499 bushels.

The first cargo of new Carolina rice for the past season was received at the Planters' and Merchants' Mill at Charleston September 1, 1892, and came from Pon Pon River. It was placed on the market September 5, and sold the same day at 4½ c. per lb. Other cargoes followed quickly, although the preparation of the grain for market was delayed by the heavy rains that prevailed about that time causing the arrivals to be lighter than usual during the remainder of that month, and prices hardened about ¼ c. per lb. In October the weather improved, and receipts greatly increased, and during that month the tendency of prices was in favour of buyers. This continued almost without variation throughout the season until a point was reached when prices had declined below the cost of production. The great increase in the crop produced in this country had, without doubt, materially affected prices, but the general stringency in the money market that prevailed last summer also aided greatly in depressing the value of rice, enabling the "bears" in the market to push the decline in prices to such a figure that a continuance of the depression would have seriously threatened the maintenance of the rice industry. The desire to avoid carrying over a large stock of this perishable staple to the coming year resulted in forced sales, and towards the end of August, 1893, a fair grade of rice was sold at 2 c. to 2¼ c. per lb.; good rice, 2⅜ c. to 2¾ c., while prime and choice qualities, being very scarce, brought from 3½ c. to 4½ c.

Up to the August hurricane, which occurred on the 27th of

that month, the prospects of the planters on the Carolina coast had been better than for several years, but, in a few hours, desolation and destruction stared many of them in the face. It was difficult at the time to even approximate the extent of the loss occasioned to the rice crop by the storm ; the most sanguine scarcely dared to hope for more than half a crop from the Atlantic coast plantations, much of which being more or less damaged from wind and water ; besides, the planters were also confronted with injuries to buildings, dykes, &c., necessitating unusual expenditures at a time when the low prices of the previous season had left them less prepared than for years to meet the unexpected outlay.

RICE Crop (Milled Rice) 1892–93.

Rice Crop of—	Quantity.	
	Barrels of 300 lbs.*	Barrels of 300 lbs.*
SOUTH CAROLINA.		
Milled at Charleston	78,190	
„ Georgetown	22,645	
		100,835
GEORGIA.		
Milled at Savannah	..	50,200
NORTH CAROLINA.		
Milled at Wilmington, Washington, and Newberne .. .	..	22,728
Total coast crop ..	..	173,763

* Net weight.

Exports and Home Consumption.

The following table shows the exports of rice from Charleston, as well as the shipments by rail, and the home consumption for the past 2 years :—

To—	Quantity.	
	1892-93.	1891-92.
	Barrels.	Barrels.
New York	28,367	30,075
Interior, by rail	39,965	28,848
Total	68,332	58,923
Consumed at Charleston	26,000	24,000
Grand total, shipped and consumed	94,332	82,923

From September 1 to December 31, 1893, there was received at Charleston 15,505 barrels of rice, compared with 33,826 barrels for the corresponding 4 months in 1892, and the total shipments were 8,864 barrels the last 4 months of 1893, and 19,772 for 1892, leaving a stock on hand at this port on the last day of 1893 of 4,603 barrels, compared with 9,654 for the previous year.

Of the above-mentioned shipments of 8,864 barrels shipped last year, 2,024 barrels went to New York, and 6,840 barrels to interior places by rail, there being no shipments of this grain to foreign countries.

Shipping and Navigation.

The total number of vessels that arrived at Charleston during the commercial year ending August 31, 1893, exclusive of those under 100 tons, was 790, compared with 860 the previous year; of this number 664 were American, and 126 foreign.

The total net tonnage amounted to 814,761 tons last year, in comparison with 880,670 tons the year before. The following table shows the classification of the vessels:—

Description.	Foreign.	Domestic.
	Number	Number.
Steamships	63	268
Barks	53	8
Brigs	6	13
Schooners	4	375
Total	126	664

Freights.

There was a good deal of fluctuation in coastwise freights last year, lumber rates which were low early in the season, advanced later on to 5 dol. 62½ c., and declined again to 5 dol. during the month of August. The monetary stringency caused freights to be inactive and depressed, owing also, in a great measure, to the instability in the value of silver money, and the ruinous policy of the Compulsory Purchase Clause in the Sherman Act, which had a disorganising effect on the financial and industrial life of the country.

Shipments of lumber and cross-ties (railway sleepers) from this port last year show a considerable increase compared with previous seasons, but freight rates on cotton and naval stores to foreign ports ruled low throughout the year, and during the spring months they had reached the lowest point ever recorded. Unremunerative freight rates did not exist alone at Charleston, however, but prevailed at all of the American Atlantic ports, and as the season closed, although prospects were better, it was the general impres-

sion that freights would rule at low rates during the coming season.

The annexed "return of British shipping at the Port of Charleston for 1893" will show in detail the proportion of Charleston's shipping trade from January 1 to December 31, 1893, in vessels flying the British flag. In this connection attention is also again invited to the map of the jetties for improving the entrance to this harbour, also accompanying this report.

RETURN of British Shipping at the Port of Charleston in the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.								Cleared.							
Total Number of Vessels.			Total Tonnage.			Total Number of Crews.	Total Value of Cargoes.	Total Number of Vessels.			Total Tonnage.			Total Number of Crews.	Total Value of Cargoes.
With Cargoes.	In Ballast	Total.	With Cargoes.	In Ballast.	Total.			With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		
							£								£
1	15	16	82	22,724	22,806	366	60	21	2	23	29,529	1,888	31,417	480	925,350

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.								Cleared.							
Countries whence Arrived.	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.	Countries to which Departed.	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.
	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.				With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		
								£									£
Chile	1	...	1	632	...	632	12	2,000	France	3	...	3	4,064	...	4,064	71	141,000
Italy	1	...	1	1,132	...	1,132	24	8,500	Germany	10	...	10	17,391	...	17,391	250	581,000
Germany... ...	10	1	11	13,101	2,018	15,119	261	40,100	Spain	9	...	9	9,374	...	9,374	186	236,000
Portugal	8	...	8	8,855	...	8,855	162	13,910	Russia	2	...	2	2,799	...	2,799	45	90,000
Spain	6	...	6	6,706	...	6,706	125	20,000	United States ...	...	21	21	...	21,434	21,434	444	...
United States ...	...	26	26	...	34,076	34,076	571	...									
Total ...	26	27	53	30,426	36,094	66,520	1,155	84,510	Total ...	24	21	45	33,628	21,434	55,062	996	1,048,000

Miscellaneous.

The early vegetable trade or truck farming

It is estimated that the value of Charleston's truck farm produce last year was not less than 2,500,000 dol. (500,000*l.*), some idea of its relative importance may be had by comparing it with the trade here in Sea Island cotton, the total crop of Sea Island cotton raised around Charleston being estimated at about 15,000 bales, having a money value of, say, 675,000 dol. (135,000*l.*).

Last season was fairly good for early fruits and vegetables, the January freezing weather so unusually protracted for this latitude only damaged the berries, shipments of which showed a falling off last year of 113,359 quarts compared with the previous season. As an offset to this, however, there was a marked increase in shipments of potatoes and miscellaneous vegetables, the total shipment of miscellaneous vegetables during 1893 were 257,869 packages compared with 189,257 in 1892.

The future prospects of the truck farming business here are considered very good, provided the railways may be induced to make satisfactory rates from the farms to market, which, together with improved methods of cultivation and transportation, faster trains, &c., it is believed will result in the business making a considerable advance on its present proportions.

The Charleston truckmen had a very good season last year, which would have been much more profitable, however, had it not been for the high freight rates charged by the railway companies.

Cotton Seed Oil Refinery.

An important and successful industry established in Charleston within the past few years is that of refining of cotton seed oil by the Mutual Refining Company of this place.

The Company was organised in 1891, and its plant is situated within the city limits on the line of the North-Eastern Railroad, and has excellent facilities for handling its product. So far as the nature of the business permits the refinery has been in continuous operation since the time of its organisation, and the results of its work have been satisfactory to the stockholders, its refined oil commanding the best prices in the home and foreign markets.

BRUNSWICK.

Exports.

The exports from this port to all foreign countries have heavily decreased in all articles, excepting phosphate rock, which increased about 12,000 tons, as compared with the report of the previous year.

Prices

The prices on naval stores have fallen off on an average of about 8 c. to 10 c. per round barrel on all grades, the prices on

pitch pine lumber and timber have decreased about 50 c. per thousand superficial feet.

Freights. Freights by steam and sail for the past year have been very dull, this chiefly owing to having had less demand for tonnage than in years past.

Industries. The oyster factories have not been running to their full capacity on account of short orders, although the proprietors report a bright prospect for a heavy spring trade.

The moss factory, a factory for utilising the grey moss that grows so abundantly in this southern climate by a certain process into a material for upholstering purposes, will soon be ready to fill large orders.

Labour. The labouring class of this port consists principally of negroes, who, although uneducated, make very good labour, they being adapted to the climate make them to a certain extent indispensable, as the white labourers cannot stand the excessive heat in the summer season.

Harbour improvements. The depth of water on the outer bar has been greatly improved during the past year by a system of dynamiting; vessels now drawing 22 feet can go to sea with safety; this is a great improvement, as heretofore it was considered dangerous to load to a deeper draft than 19 feet.

Quarantine station. The United States Government has assumed control of this station, and is putting in new and complete apparatus for fumigating and disinfecting, and when completed will be able to quickly and thoroughly fumigate vessels coming from infected or suspected ports. It is claimed by the surgeon in charge that it will be one of the best equipped stations on the South Atlantic coast.

City improvements. The city has recently closed a contract for 21 miles of sewerage, and work will begin on same at once. The streets are now kept cleaner than ever before, and the town presents a very healthy and clean appearance.

Railroad facilities. The plant system has assumed control of the Brunswick and Western Railroad, and with its great facilities for handling freight are giving despatch, thus greatly helping the trade of this port.

The East Tennessee, Virginia and Georgia Railroad Company has also added new facilities for handling freight to their property here.

It is reported from good authority that a railroad will be built by northern and English capital from Atlanta to South Brunswick, a place about 5 miles distant from here, which place has splendid shipping facilities.

RETURN of all Shipping to Foreign Ports from the Port of Brunswick, Ga., for the Year 1893.

Country.	Cotton.			Resin.		Spirits of Turpentine.		Lumber.			
								Boards, Deals, and Planks.		Joists and Scantlings.	
	Quantity.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
	Bales.	Lbs.	Dollars.	Barrels.	Dollars.	Gallons.	Dollars.	M. feet.	Dollars.	M. feet.	Dollars.
Great Britain	22,378	10,900,014	814,229	22,159	67,717	744,304	198,899	960	12,846	..	..
Scotland	..	..	..	7,173	18,700	236,341	64,209	70	777	..	..
Ireland	..	..	..	..	..	..	..	91	1,122	..	..
Nova Scotia	..	..	..	..	..	..	..	251	3,021	..	..
British West Indies ..	..	..	..	..	..	..	..	34	525	..	..
Austria	..	..	..	2,727	5,380	..	..	..	..	..	..
Africa, West Coast ..	..	..	..	..	..	..	..	187	2,574	92	1,104
Argentine Republic ..	..	..	..	..	..	..	..	119	1,539	126	1,509
Brazil	..	..	..	..	..	..	..	5,153	63,338	..	..
France	2,600	1,291,969	96,897	..	..	..	..	.	..	..	..
Germany	3,325	6,518,764	549,753	42,198	151,605	173,957	43,601	39	525	..	..
Netherlands	..	..	..	46,428	92,015	460,921	103,880	15	178	..	..
Portugal	..	..	..	..	..	..	..	6	83	..	..
Spain	30	14,789	1,220	4,071	9,364	..	..	4,382	48,379	70	902
Cuba	..	..	..	..	..	..	..	519	6,842	827	11,574
Puerto Rico	..	..	..	..	..	..	..	361	4,911	308	3,776
Russia	..	..	..	3,748	12,080	..	..	..	..	..	..
Cape Verde Islands ..	..	..	..	10	24	..	..	185	1,845	114	1,144
Total	28,333	18,725,536	1,462,099	128,514	356,835	1,615,523	410,589	12,372	148,095	1,537	20,009

RETURN of all Shipping to Foreign Ports from the Port of Brunswick, Ga., for the Year 1893—continued.

Country.	Timber.				Cotton Seed.		Phosphate.		All other Articles.	Total Value.
	Sawn.		Hewn.							
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Value.	
	M. feet.	Dollars.	M. feet.	Dollars.	Sacks.	Dollars.	Tons.	Dollars.	Dollars.	Dollars.
Great Britain	2,229	24,316	319	4,022	5,728	6,930	2,801	28,100	..	1,156,559
Scotland	1,809	20,418	13	260	..	..	..	..	..	104,364
Ireland	2,021	23,955	413	2,293	..	..	1,350	13,500	..	40,870
Nova Scotia	105	1,365	..	..	..	..	..	..	..	4,386
British West Indies	..	..	..	..	..	..	..	..	671	1,196
Austria	..	..	..	..	..	..	..	..	..	5,330
Africa, West Coast	..	..	..	..	..	..	..	..	..	3,678
Argentine Republic	..	..	..	..	..	..	..	..	..	3,048
Brazil	227	2,934	..	..	..	..	..	..	..	66,272
France	..	..	..	..	..	..	2,220	22,220	..	119,097
Germany	..	..	..	..	..	..	25,797	265,535	1,950	1,012,969
Netherlands	208	20,811	96	959	..	..	1,642	16,042	..	233,885
Portugal	42	4,289	..	..	..	..	..	..	..	4,372
Spain	1,512	19,071	..	..	..	..	..	..	120	79,056
Cuba	..	..	..	..	..	..	..	..	20,159	38,575
Puerto Rico	..	..	..	..	..	..	..	..	..	8,687
Russia	..	..	..	..	..	..	..	..	..	12,080
Cape Verde Islands	..	..	..	..	..	..	..	..	2,209	5,222
Total	8,153	117,159	841	7,534	5,728	6,930	33,810	345,377	25,109	2,899,646

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1894.

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No. 1431.

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UNITED STATES.

REPORT ON THE

AGRICULTURAL CONDITION OF TEXAS.

Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.

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No. 1431.

UNITED STATES.

GALVESTON.

Consul Nugent to the Earl of Kimberley.

My Lord, *Galveston, June* 18, 1894.

I HAVE the honour to enclose herewith a Report on the Agricultural Condition of Texas, together with some information in regard to matters thereto allied.

It would appear from the archives of this Consulate, as far as I have been able to ascertain, that no specific Report on Agriculture has been forwarded by any of my predecessors at Galveston during the past few years. I have therefore judged it advisable, seeing that the interests involved in Agriculture in Texas are so vast and important, to draw up the present Report in a more detailed and voluminous manner than would otherwise have been the case, and to refer to and annex statistics going as far back as 1887.

I am indebted for a great portion of the information given by me to the admirable series of Agricultural Reports published by the State of Texas under supervision of the Commissioner of Agriculture, and have been guided by the endeavour to, if possible, bring about a more adequate conception of the vast natural resources and agricultural progress of this State.

The State Agricultural Report for 1893 not yet having been published, I have been unable to give statistics later than those for the year 1892.

Those portions of the Report concerning the effect of weather upon crops in Texas are taken from interesting articles in the public press by Dr. Cline, Meteorologist in charge of the United States Weather Bureau at Galveston.

I have, &c.

(Signed) HORACE D. NUGENT.

Report on the Agricultural Condition of the State of Texas, with some Information regarding Matters therewith connected.

Abstract of Contents.

	Page
Description of the State of Texas—	
Area	3
Situation	3
Topography	3
Soil	4
Climate	4
Timber growth	7
Pecan tree	8
Value of pecan nut crop	8
Irrigation, &c.	8
Exemptions from taxation and forced sales	9, 10
Cost of land	10
Public lands	10
Agricultural and Mechanical College of Texas	14
Experiment stations	15
Farmers' organizations	16
Agricultural products	18
Cotton	19
Brief history of cotton production in the United States	19
Indian corn or maize	24
Wheat	26
Oats	28
Rye	29
Barley	29
Millet	29
Hay	30
Potatoes	30
Sugar-cane	31
Bee-culture—production and value of honey, 1891 and 1892	32
Horticulture	32
Live stock	34
Importance of ranching industries	34
Ranching less profitable than formerly	34
Sheep	34
Cattle	34
Horses	34
Other live stock	35
Statistical tables	36–40

Description of the State of Texas.

The area of Texas, according to the official statement made by the General Land Office, is 252,514 square miles, of which 250,004 square miles are land, and 2,510 square miles water surface. This total area is equal to 8·7 per cent. of the entire area of the United States. It is by far the largest State in the Union, being six times larger than New York, and seven times as large as Ohio, the two next in size. Some idea of the vastness of this one State may be gathered when it is learnt that Texas is 34,000 square miles larger than the Austrian Empire, 62,000 more than the German Empire, and nearly 70,000 square miles greater than France. Area.

Texas lies in the extreme south-western portion of the United States, between the 26th and 36th parallels of north latitude, and the 94th and 106th meridians of longitude west of Greenwich. From north to south it is nearly 750 miles in length, and from east to west about 800 miles in breadth. Custom has divided the State into five parts, viz., Central, Northern, Southern, Eastern, and Western Texas, but these divisions are not clearly defined. Situation.

The country lying east of the 96th degree of longitude, and north of the 30th parallel of latitude, known as East Texas, is characterised by a long range of hills running irregularly from north-east to south-west, and is also marked by a heavy growth of timber, chiefly pine, oak, and hickory. Topography.

The Coast District is thus described :—

"The coast of Texas presents features different from those of any other State, for while in many other States the mainland coast is greatly cut up into large bays, extending many miles inland, it is here bordered by an almost continuous chain of islands and peninsulas (the latter having the same trend). The Gulf border of this chain is a very regular line south-west from the mouth of the Sabine River or Lake, to near Corpus Christi, which occupies the highest point on the entire coast, and then turns with a regular curve south, and slightly south-east to Mexico."

The territory east of the timber region and north of the Coast District is a vast open plain composed of gently rolling prairies and gradual elevations. It is covered with a luxuriant growth of native grasses and occasionally dotted with timber, and extends to the Red River on the north, and the mountain ranges of the west and north-west. The water courses and ravines are usually fringed with a growth of timber of various kinds.

West and north-west lie the hills and mountain regions of Texas, which are continuations southward of the mountains of Mexico, New Mexico, and Colorado.

In the extreme north-west, bordering on Kansas on the south, and New Mexico on the west, is the elevated tableland formerly known as the "Llano Estacado" or Staked Plain. It is to-day

called the "Panhandle" of Texas, and is destined to become one of the best agricultural and stock-raising sections of the State.

On a line north of Austin and San Antonio, and running in a south-westerly direction, there is a low range of hills that mark a change in the topography of the country. Westward it is more broken, and the elevations more abrupt.

Soil.

Texas lays claim, and with justice, to a greater variety and richness of soil than any other State. Black waxy, black sandy, black pebbly, "hog wallow," grey sandy, red sandy, sandy loam, and alluvial soils are each to be found in the State, the majority of them in greater or less quantities in each portion of it. The best evidence, probably, that can be offered as to the richness and fertility of these various soils is the fact that artificial manures and fertilisers, now so commonly in use in the older portions of the Union, and constituting a fixed charge on the agricultural profits of those States, are said not to be required or used at all in Texas. There are said to be thousands of acres at present in cultivation in the State that have been cultivated continuously for more than 30 years, and that they yield as much now as when first planted.

The principal soils of Texas are the black waxy, black sandy, and alluvial soils, the others mentioned above being minor divisions. A description of these three will be sufficient for the purposes of this report.

Black waxy soil.

This, so called from its colour and sticky qualities, is the richest and most durable of the soils of the State. It constitutes a large portion of the prairie region, and is specially adapted to the growth of cereals. It varies in depth from 12 inches to many feet, the average depth being about 18 inches, and is not appreciably affected by the washing rains so injurious to loose soils. One of the largest bodies of upland black prairie in the Union extends from Lamar County, on the Red River, south-west in an irregular manner to a point south of San Antonio, in Bexar County, with a width of 140 miles at the north end, 100 miles in the middle, and about 60 miles at the south end. It embraces 23 and parts of 26 counties.

Black sandy soil.

This soil covers a very large area of the State, and is specially productive for gardening purposes and fruit growing. It is very loose, easily cultivated, but requires care to prevent its deteriorating by washing away of the surface. It is chiefly found in portions of the timber region, and in counties bordering on the timber belt of East Texas.

Alluvial soil.

The alluvial soils of the river bottoms vary according to the territory drained by the streams on which they are situated. Those east of the Brazos River have more of the waxy character and are stiffer than those on the Brazos itself and the streams to the west of it that drain the sandy lands of the north-west. The Brazos River bottom is considered the most valuable in the State, owing to its fertility and comparative immunity from overflow.

Climate.

The climate of Texas is favorable with [illegible] winters, and long, dry summers, as is to be expected from the geographical [illegible]. The influence of the winds from the Gulf of Mexico is

most marked on the climate, so much so that the actual temperature along the coast and for many miles inland is much lower during the summer than in latitudes much higher to the north. The same Gulf winds influence to a great degree the winter months, making that season mild and delightful. The great drawback is the amount of humidity generated by the damp sea winds which, although not positively unhealthy, is yet a cause of much discomfort.

Temperature.

The following table shows with great exactness the monthly and annual mean temperature all over the State:—

TABLE showing the Monthly and Annual Mean Temperature (in Degrees Fahr.) at Various Texas Stations.

(Compiled from the records of the United States Signal Service.)

Stations.	Elevation.	January.	February.	March.	April.	May.	June.	July.	August.	September.	October.	November.	December.	Annual.	Years included in Average.
Coast District*—	Feet.														
Galveston	40	52·1	57·2	63·4	69·3	76·2	82·3	84·3	83·6	79·7	72·3	62·3	56·3	69·9	17
New Ulm	...	50·2	56·4	63·0	68·3	74·6	80·5	82·7	82·6	77·7	69·7	59·2	53·6	68·2	16
[illegible]	26	51·9	57·4	64·5	69·8	76·1	81·9	83·6	82·7	79·3	72·8	62·3	56·3	69·9	15
[illegible]	43	57·3	62·2	68·2	73·9	78·3	82·2	83·5	82·6	79·3	74·6	65·7	60·3	72·2	12
Eastern District†—															
[illegible]	496	42·2	52·1	58·9	65·4	71·2	78·2	81·4	80·2	75·6	66·1	56·6	48·8	64·7	6
Catasauqua	448	46·1	51·5	59·2	66·5	74·0	80·4	84·3	83·1	76·2	67·1	54·7	48·6	65·7	7
[illegible]	767	42·6	48·3	55·8	64·8	71·7	78·5	82·1	80·8	73·6	64·5	50·6	44·6	63·2	8
South Central District‡—															
[illegible]	513	48·2	53·8	60·6	70·8	74·6	83·4	84·0	83·8	77·7	67·5	57·5	50·2	67·7	13
San Antonio	676	50·6	56·0	63·3	69·5	75·3	81·2	82·9	82·3	77·6	69·5	58·7	53·3	68·5	9
[illegible]	200	53·0	57·6	67·1	74·0	78·4	82·7	84·4	83·8	80·6	72·6	63·3	55·0	71·0	2
North Central District§—															
[illegible]	2,120	41·8	48·5	57·0	64·4	71·6	78·3	82·0	81·1	73·6	63·4	51·8	43·8	63·1	9
[illegible]	1,133	42·8	47·4	57·4	67·0	73·2	80·9	83·9	81·8	74·2	66·8	52·7	44·0	64·3	5
[illegible]	915	39·0	44·2	53·9	64·4	72·4	80·9	84·2	79·9	77·0	66·5	48·0	41·5	62·5	4
Western District‖—															
[illegible]	1,888	42·3	47·8	57·4	64·6	72·1	80·0	82·5	79·8	73·3	65·1	51·2	45·5	63·5	8
[illegible]	3,050	43·0	48·8	56·6	63·9	72·2	78·8	80·6	78·0	71·9	63·4	50·6	45·5	62·8	9
El Paso	3,370	44·6	50·2	56·6	60·0	72·4	80·8	82·0	79·2	72·6	63·4	51·0	45·8	63·2	10
[illegible]	4,918	43·5	48·6	54·3	60·7	68·6	70·6	75·6	72·4	69·7	60·8	50·7	45·1	60·0	10
Eagle Pass	800	51·6	56·8	65·5	73·5	79·8	85·7	87·2	84·1	79·3	71·7	58·6	52·8	70·5	6
Panhandle District¶ —															
[illegible]	2,500	30·6	36·0	46·0	55·6	63·8	73·0	77·0	74·7	68·2	56·8	42·5	34·4	54·8	3
[illegible]	3,800	43·7	46·8	54·3	61·0	72·6	76·8	78·9	81·0	73·0	61·2	50·6	40·6	61·7	2
Mediated	2,779	39·3	46·9	52·1	64·3	77·5	80·0	84·2	81·1	73·3	61·5	48·6	41·7	62·3	2

* Within 15 miles of coast.
† East of the 97th degree, above Coast District.
‡ 97th to 100th degree, below 31st degree, above Coast District.
§ 97th to 100th degree, above 31st degree.
‖ West of 100th degree, below 32nd degree.
¶ West of 100th degree, above 32nd degree.

Prevailing winds.

The prevailing wind throughout the entire State is the south wind from the Gulf of Mexico.

"Northers."

The "norther" is an important feature of Texan climate, but one by no means fraught with such portentous consequences as people abroad have been led to believe by sensational writers. It is nothing but a cold wind from the north, but the long unobstructed sweep across the prairies from the plains of the north-west, heightens its velocity and renders its approach more sudden. These features alone distinguish it from a cold wave from the north in other States. Northers are known as "wet" or "dry," according to their being accompanied by rain or sleet, or without either. The "wet" norther does more damage to crops and live-stock than the dry; its duration is generally about 24 hours. Dry northers last from 48 hours to 1 week, the wind attaining its greatest velocity within 24 hours, and then gradually subsiding and veering to the south again. The dry norther, driving away as it does all miasma, is a very healthy influence.

General climatic conditions.

The general climatic conditions of Texas may be summed up as healthful, and excepting the bottom lands along the rivers and streams, and the low grounds subject to periodical overflows, where malarial fevers exist, there is no pre-disposing climatic cause for sickness.

Timber growth.

The area of timber in Texas is much greater than generally supposed by persons not familiar with the country. Many suppose that the State is a vast treeless plain, but this idea is erroneous. In the prairie regions, the bottoms along the streams are skirted with timber, and in most places there is a happy admixture of prairie and timber land. Besides this, Eastern and South-Eastern Texas is covered with a dense growth of fine timber, embracing nearly every variety in the Southern States.

Area of timber lands.

Reports show that there are 35,537,967 acres of timber land in Texas.

"Cross Timbers."

The "Cross Timbers" is the name given to two irregular belts of timber, varying in width, and entering the State on the Red River on the north, and running in a southerly direction across the prairie region.

The "Lower Cross Timbers" run from a point on the Red River north of Gainesville, to the Brazos River, a distance of 135 miles, and has an average width of 10 to 15 miles, interspersed at intervals with small prairies.

The "Upper Cross Timbers" leaves the Red River at a point further west, passing south through Montague County, at the lower edge of which it divides, the eastern portion passing south through Wise and Parker Counties, the western trending further west, and extending south into Erath County.

Varieties of timber.

The timber growth of the Cross Timbers is principally post and blackjack oaks. On the streams and lowlands, ash, hackaberry, pecan, and cottonwood trees are found.

On the grey sand hills in Eastern Texas the timber growth is mainly scrubby post and blackjack oaks. On the black sandy land the growth is the same but more perfect. The red lands are

covered with hickory, red, and post oaks, with a few sweet and black gum trees and elms interspersed.

In the extreme north-eastern portion of Texas the long leafed pine grows in great abundance, whilst the short leafed variety is found interspersed with hickory and the various oaks, from Bowie County on the Red River, south, along the eastern edge of the State, finally merging into the long leafed pine region.

Area of pineries.

The area of the pineries, both long and short leafed, is estimated at 25,000,000 acres, capable of producing 64,587,420,000 feet of lumber.

Along the streams, especially the larger ones, walnut and ash trees are abundant, whilst in the southern portion of the State near the Gulf, the live oak is prominent.

Mesquite.

The mesquite is a tree found more generally in Western Texas than any other and is a common growth on the prairie. It is a small scrubby tree, and produces a bean which is very nutritious and highly prized as food for horses and cattle. It has rapidly spread over the prairies within the last few years, and now furnishes fuel in places where a few years ago not a stick was to be found.

Pecan tree.

The pecan tree, which produces the delicious pecan nut, is found on nearly every stream, but more abundantly in Southern and Western Texas, where there are numerous groves in the valleys and on the uplands. The gathering and marketing of the pecan crop is a considerable industry in that portion of the State.

Value of pecan nut crop.

The crop is generally valued at over 500,000 dol.

West of the 100th meridian the timber growth is very limited, and almost exclusively in the ravines and waterways.

Immigration, &c.

Texas as a field for immigration.

Texas undoubtedly presents a vast and alluring field for immigration, especially to the agriculturist. Her immense size, fertile soil, healthy and equable climate are advantages not to be scorned, and make a comparison with other agricultural States of the Union, such as Kansas, Iowa, Nebraska, and Dakota, result in favour of this State. Notwithstanding, however, these advantages immigration into Texas, though yearly increasing, is yet comparatively small. The proportion of foreign immigrants arriving in the States with a view to proceeding to Texas is trifling compared

Foreign immigrants.

to the total. For instance, in 1892, out of 374,741 immigrants landing at New York, but 2,290 were en route to this State. Probably, taking all the immigrants landed at Boston, Philadelphia, Baltimore, and New Orleans, together with those landing at New York, some 15,000 or so came direct from foreign countries to this State in 1892. The greater part of the immigration into Texas is without doubt from other States in the Union, especially the southern States. When it is considered that the total population of this vast State of over 250,000 square miles was, in 1890, only 2,235,523, an increase of 643,774 since 1880, it will be seen at a

glance what an immense field for immigration, both domestic and foreign, lies here. This State could without difficulty support a population 20 times as large as it now is. The natural increase of population alone, without immigration, is not sufficient to produce enough inhabitants to develop to the utmost the vast natural resources of Texas.

Outlook for immigration.

It is, therefore, to immigration that the State must look for future development. The place she occupies to-day is due entirely to the hardy pioneers from other States and foreign shores, and far from displaying jealousy of outsiders, it should be her policy to encourage their coming.

Obstacles to immigration.

The chief obstacle to foreign immigration has been want of knowledge. Texas is in reality very little known, even by her neighbours. A plan has lately been mooted in the public press to advertise more widely the advantages of this State, and it cannot be doubted but that such a course would have a decidedly good effect. Not that the State is illiberal in her treatment once the immigrant has arrived. Far from it, as will be seen later. It is the lack of properly bringing into notice her advantages that prevents greater immigration. Merchants and business men in general are now awaking to this fact, and steps are being taken by Chambers of Commerce and other public bodies to remedy this deficiency.

Class of immigrants desired.

Texas being an agricultural, not a manufacturing country, it stands to reason that farmers and farm labourers have the best chance of succeeding. For labourers, skilled and unskilled, and domestic servants there is also some prospect, also for mechanics, but in the present state of the country it is useless for clerks, &c., to come out here.

Advice to intending immigrants.

It would be advisable for all those emigrating here to possess some little money so as to enable them to look round before deciding where to settle and what to do. Many who have bought land without having seen it have found on arrival, to their bitter experience, that they have been tricked, and that their land was useless or unhealthy. Again, it would be better for men with families, to come if possible alone at first, and send for their families later when settled.

Nor need a man be deterred from coming by the idea that it is necessary to buy at least 150 acres or 200 acres for a farm. On the contrary 10 acres, properly farmed by modern methods, are enough to keep a whole family in comfort, provided the land is close enough to a railroad to have the produce promptly shipped.

Farmers and agriculturists in general are well protected by State law, as the following exemptions from taxation and from forced sale exemplify:—

Exemptions from taxation.

Farm products in the hands of the producer and family supplies for home and farm use.

Household and kitchen furniture to the value of 250 dol., including a sewing machine.

All annual pensions granted by the State.

All public property.

Lands used exclusively for graveyards or grounds for burying the dead, unless held by persons or corporations for profit.

Buildings and lands attached thereto belonging to charitable or educational institutions, and used exclusively for charitable or educational purposes.

Exemptions from forced sale.

A homestead worth 5,000 dol. exclusive of improvements, if in a town or city; if in the country, 200 acres, including improvements and crops growing thereon, except for part or all of the purchase money thereof, the taxes due thereon, or for material used in constructing improvements thereon, and in this last case only when the work and material are contracted for in writing, with the consent of the wife given in the same manner as is required in making a sale and conveyance of the homestead.

All household and kitchen furniture, and all provisions and forage on hand for home consumption.

Any lot or lots in a cemetery for the purpose of sepulture.

All implements of husbandry, and all tools, apparatus, and books belonging to any trade.

The family library and all family portraits and pictures.

Five milch cows and their calves, and two yoke of work oxen, with necessary yokes and chains.

One gun, two horses, and one wagon, one carriage or buggy, and all saddles, bridles, and harness necessary for the use of the family.

Twenty head of hogs, and 20 head of sheep.

All current wages for personal services.

Cost of land.

The cost of farm land varies, of course, according to the fertility, situation, closeness to railway, &c. In the large cotton-producing district, such as Ellis, Fayette, Hill, and Bell counties, improved land sells anywhere from 15 dol. to 50 dol. an acre, with an average of about 30 dol., while unimproved land fetches from 2 dol. to 10 dol. In the outlying districts, such as Hale, Floyd, Crosby, Dickens, and Potter counties, for example, land unimproved brings from 2 dol. to 5 dol. per acre, and 3 dol. to 8 dol. when improved. These prices are merely given as average examples of the cost of land, and it is impossible to estimate exactly the value all over such a vast and varied State as Texas. They refer also to land bought of private persons or corporations.

The State of Texas, however, owns about 4,400,000 acres of unappropriated land which can be acquired by private persons. There are further 30,000,000 acres of common, school, university, and asylum lands which can be acquired also by the public.

Public Lands.

Under this head is included all the lands owned by the State or held in trust for any of its public institutions.

Unappropriated public lands.

There are about 4,400,000 acres of unappropriated public lands belonging to the State. This must be acquired by the provisions of the law relating to homestead donations.

Homestead donations how acquired.

Every head of a family without a homestead shall be entitled

to receive a donation from the State of 160 acres of vacant unappropriated public land, and every single man of the age of 18 years or upwards shall be entitled to receive from the State 80 acres of vacant and unappropriated public land. The applicant must apply to the surveyor of the district or county in which the land is situated, in writing, designating the land he claims, stating that he claims the same for himself in good faith, &c., that he is without any homestead of his own, that he has actually settled on the land, &c., and that he believes the same to be vacant and unappropriated public domain. The survey to be made within 12 months after date of application. When the terms of the law have been complied with, and proof of such fact, together with the proof of 3 years' continuous occupancy, is filed with the Commissioner of the General Land Office, patent will be issued to the claimant or his assignee. (Title LXXIX, Ch. 9, Revised Statutes.)

Appropriated public lands of not more than 640 acres in organised counties: how acquired.

By virtue of an Act passed March 29, 1887, and amended April 5, 1889, "To provide for the sale of such unappropriated public lands, situated in organised counties as contain not more than 640 acres," it is provided that any person desiring to purchase any of such unappropriated lands situated in any of the organised counties of the State as contain not more than 640 acres, appropriated by an Act to provide for the sale of a portion of the unappropriated public land, &c., approved July 14, 1879, may do so by causing the same to be surveyed by the surveyor of the county in which the land is situated.

The person desiring to purchase shall make application in writing, describing the land by reference to surrounding surveys. The land must be surveyed within 3 months from date of application, and within 60 days after said survey the surveyor shall certify, record, and map the same in his office, and within said 60 days return the same to the General Land Office, together with the application. Within 90 days after the return to and filing in the General Land Office the applicant must pay into the State Treasury the purchase money at the rate of 2 dol. per acre, patent to be issued by the Commissioner of the General Land Office when the Treasurer's receipt is filed in his office. Failure to make the payment within 90 days forfeits the right to purchase, and the applicant cannot afterwards purchase under the Act. (Chapter 80, Acts of 20th Legislature, pp. 61 and 62.)

Common school, university, and asylum lands.

The Act of April 1, 1887, and the Act emendatory thereof of April 8, 1889, provide for the sale of all lands heretofore or hereafter surveyed and set apart for the benefit of the public free schools, the university, and the several asylums, amounting in all to about 30,000,000 acres.

Classification.

All lands under this head must be classified by the Commissioner of the General Land Office into agricultural, pasture, and timber lands, and valued according to classification before being placed on the market. When classified and valued the Land Commissioner is required to notify the county clerks of the counties where the lands are situated of the value of each section of land offered for sale in their respective counties and counties attached

for judicial purposes, which notification said clerk must keep on record for public inspection.

To whom and in what quantities sold.

Lands classified as agricultural are sold to actual settlers only in quantities of not less than 80 acres, and in multiples thereof not more than 640 acres, provided that where there is a fraction of less than 80 acres of any section left such fraction may be sold. Where two quarter sections are purchased they must constitute a given half of some section. Lands classified as purely pasture lands, and without permanent water thereon, may be sold in quantities not to exceed four sections to the same person. Parts of two sections cannot be purchased without taking the whole of one section. No sales are made to a corporation, foreign or domestic, and all sales to a settler are made on express condition that any sale, transfer, or conveyance of such land to a corporation, either immediate or remote, shall ipso facto terminate the title of the purchaser and forfeit the land to the State. No watered portion of any section shall be sold unless there is permanent water on or bordering on the part of section remaining unsold.

Minimum price of land.

The minimum price of lands sold under this Act is 2 dol. per acre. Lands having permanent water thereon, or bordering thereon, are sold at not less than 3 dol. per acre. Timbered lands are sold at not less than 5 dol. per acre. By timbered lands is meant lands chiefly valuable for the timber thereon. The timber on such lands may also be sold at the discretion of the Commissioner of the General Land Office for 5 dol. per acre cash, except where land is sparsely timbered, then for not less than 2 dol. per acre, the purchaser to have five years from the date of purchase to remove the timber therefrom, after which, if not removed, it reverts to the State without judicial ascertainment.

Terms of sale.

Agricultural and pasture lands are sold on 40 years' time at 5 per cent. per annum interest. One-fortieth of the aggregate purchase-money must be paid in advance and an obligation duly executed, binding the purchaser to pay to the State Treasurer, on August 1 each year thereafter, until the whole is paid, one-fortieth of the purchase-money and the interest on the whole of the unpaid purchase-money. Within one year next after the expiration of three years' residence on the land the purchaser must make proof by his own affidavit, corroborated by the affidavits of three disinterested and credible citizens of the county, certified to by some officer of the court, that he has resided on the land three years. Upon receipt of the fortieth payment by the treasurer, and the affidavit and obligation required to be filed with the application for the land, the sale is held effective.

All purchasers have the option of paying in full any day after they have resided on their land three consecutive years, proof of which must be furnished the Commissioner of the General Land Office. Purchasers may sell their land any time after three years, the vendee or subsequent vendees to become subject to all the conditions of sale to the original purchaser.

If the interest due on August 1 of any year is unpaid, the

purchaser shall have until January 1 thereafter to pay said interest, and for said default shall pay 50 per cent. penalty of said interest past due. Failure to pay said past due interest and penalty on or before the said January 1 any year works a forfeiture of the land without the necessity of re-entry or judicial ascertainment, except where the purchaser dies, in which event his heirs have one year after August 1 next after such death in which to make payment.

Timbered lands are sold for cash.

Applications for land.

All applications for the purchase of land must be forwarded to the Commissioner of the General Land Office at Austin, accompanied by an affidavit stating in effect that the applicant desires the land for a home, and has in good faith settled thereon; that he is not acting in collusion with others for the purpose of buying the land for any other person or corporation, and that no other person or corporation is interested in the purchase save himself.

Leases.

The Commissioner of the Land Office may, at his discretion, lease any of the public lands not in demand for actual settlement, for a period of not over five years, at 4 c. per acre per annum in advance.

Applications to lease.

Applications to lease shall be made in writing to the Commissioner of the Land Office, and shall specify and describe the land desired. If satisfied that it is not detrimental to the public interest, the Commissioner may execute under his hand and seal, and deliver to the lessee, a lease for the time agreed upon of any land applied for.

Conditions of lease.

Grazing lands are not subject to sale during the term of the lease. Lands classified as agricultural shall be leased subject to sale, the lessee to give immediate possession when such lands are sold, and allowed a pro rata credit upon his next year's rent, or the money refunded to him by the treasurer, as he may elect; provided that no such sale shall be effected of a section where the lessee has placed improvements of the value of 100 dol. thereon; and provided further that no actual settler purchasing within a leasehold shall be permitted to turn loose therein more than one head of cattle or horses for every 10 acres of land purchased by him and enclosed, or in lieu thereof four head of sheep or goats. Each violation of this proviso subjects the violator to a fine of 1 dol. for each head of stock so turned loose, and each 30 days' violation constitutes a separate offence.

Failure to pay the annual rent due for any year within 60 days after the same shall have become due subjects the lessee to forfeiture at the discretion of the Land Commissioner. The State retains a lien upon all improvements on leased lands to secure payment of rents.

Leaseholds are exempt from taxation.

Unlawful use.

It is unlawful for any person to fence, use, occupy, or appropriate, by herding, line-riding, or other means, any portion of the public lands; and the Attorney-General is authorised to bring suit for the recovery of such land and damages for its use and

occupation, and such suits may be brought in the district court of Travis county.

Gateways. Fences on grazing lands must not be constructed for more than 3 miles lineal measure, running in the same general direction, without a gateway in the same.

Issuance of patents, fees, &c. Patents to lands are issued by the Commissioner of the General Land Office when the receipt of the State Treasurer (to whom all payments are made) for all payments due on the land is presented at the Land Office and the patent fees thereon paid.

Patent fees. Patent fees are as follows:—

	Amount.
	Dollars.
320 acres of land or less	5
Over 320 acres and up to 640 acres	6
Over 640 acres and up to 1,280 acres	10
Over 1,280 acres and up to ½ of a league	12·50
Over ½ of a league and up to 1 league and labor	15
1 league and labor	20
Each set of field notes filed for less than 1 league and labor ..	1
Each set of field notes filed for more than 1 league and labor ..	2

Location of school lands. The number of acres of school lands located in each county is given in connection with the statistics of the counties, and represents the amount of unsold public school land in the county on September 1, 1892.

County school lands. Four leagues of school land have been set apart for each county in the State, to be used for educational purposes. Said lands are in the control of the commissioners' courts of the several counties to whom purchasers should apply. Many counties have already leased or sold their lands.

Blank applications to purchase or lease lands. Any person desiring to purchase or lease public lands can procure blank applications suitable for each class of land for sale or lease by applying to the Commissioner of the General Land Office at Austin.

Spanish land measurement. Divisions of land in this State are made according to Spanish land measurement, by varas, labors, and leagues, and distances are given in linear varas:—

1 vara	= 33⅓ inches
1 acre	5,646 square varas = 4,840 square yards
1 labor	1,000,000 square varas = 177 acres
½ league	8,333,333 square varas = 1,476 acres
1 league	25,000,000 square varas = 4,428 acres
1 league and labor	26,000,000 square varas = 4,605 acres

Agricultural and Mechanical College of Texas.

Origin of agricultural college. This institution owes its foundation and endowment to an Act of the United States Congress approved on July 2, 1862 and amended July 23, 1866 and to a joint resolution of the Legislature of Texas approved November 1, 1866, and to an Act of the same

body April 17, 1871. The college is a branch of the University of Texas, and is for instruction in agriculture, the mechanical arts and natural sciences connected therewith. It has been open for students since October 4, 1876.

The college is situated in Brazos county, 5 miles south of Bryan, and 95 miles north-west of Houston. The government of the college is vested in a board of directors consisting of five members appointed by the Governor of the State, who hold office for six years. Situation.

In November, 1866, the gift was made by Congress of 180,000 acres of public land for the endowment of the college. This land was sold for 174,000 dol., which sum was invested in 7 per cent. State bonds. At the present time this fund, together with accumulated interest, produces an annual income of 14,280 dol. Permanent fund.

The county of Brazos gave the college its present grounds, consisting of 2,416 acres of land. Grounds.

The general object of the college is to excite and foster in the community a due appreciation of the value of those pursuits, chiefly agricultural, by which the material advancement of the State is promoted. Objects and present policy.

It is sought to turn the attention of young men to occupations which have brought wealth and power to other parts of the Union, and which are beginning to attract and well repay the services of trained young men in Texas. It is endeavoured to attain this end by a thorough course in mathematics and natural science, with continual application of principles to practical work in the shops, fields, gardens, vineyards, orchard, pastures, dairies, &c., text books being relied upon as little as possible.

The regular courses of study lead to the degrees of Bachelor of Scientific Agriculture, Bachelor of Mechanical Engineering, Bachelor of Civil Engineering, and Bachelor of Scientific Horticulture. There are special short courses also in agriculture, horticulture, dairying, carpentry, blacksmithing, machinery, chemistry, drawing, and surveying. Degrees.

In 1887 Congress made provision for establishing, equipping, and supporting agricultural experiment stations in the several States, the stations to be placed under the supervision of the boards of directors of the State agricultural and mechanical colleges, where such colleges have been established. Experiment stations. Plan of organisation.

The Act of Congress appropriates 15,000 dol. per annum from the United States Treasury to each State to equip and support the stations. Owing to some technical defect in the Bill as passed, additional legislation was required to make the fund available. By recent enactment the appropriation is placed at the disposal of the several States, and the stations are being organised.

The purposes for which the Agricultural Experiment Station Bill was passed are clearly set forth in Section 2 of the Act, which reads as follows:— Object of the stations.

"It shall be the object and duty of said experiment stations to conduct original researches or verify experiments on the physiology of plants and animals; the diseases to which they are severally

subject, with the remedies for the same; the chemical composition of useful plants at their different stages of growth; the comparative advantages of rotative cropping as furnished under a varying series of crops; the capacity of new plants or trees for acclimation; the analysis of soils and water; the chemical composition of manures, natural or artificial, with experiments designed to test their comparative effect on crops of different kinds; the adaptation and value of grasses and forage plants; the composition and digestibility of the different kinds of food for domestic animals; the scientific and economic questions involved in the production of butter and cheese; and such other researches or experiments bearing directly on the agricultural industry of the United States as may in each case be deemed advisable."

The Bill further provides that reports of the progress made in experiments shall be published from time to time, one copy of which shall be sent to each newspaper published in the State where such station is located, and one to each individual actually engaged in farming who may request the same, as far as the means of the station will permit; all such reports to be carried in the mails free.

Texas experiment station.

In accordance with the Act of Congress the Board of Directors of the Agricultural and Mechanical College of Texas have established this station and made provision for its work.

The station is situated at and is a department of the college. Such part of the college farm, buildings, and other equipments as may be deemed necessary for experimental work is assigned to it by the directors. If necessary, further equipment is provided from the experiment station fund. All work is carried on with the co-operation of farmers and agricultural associations, who are consulted with regard to the working of the station.

Experiments.

Following is a list of the most important investigations so far as undertaken by the stations:—

A study of the disease of the cotton plant known as "blight" or "root rot," and experiments to find a preventive for the same; jointly with the Missouri Agricultural Experiment Station, a study of the cattle disease (Texas fever) to determine how the disease is transmitted, what parts of the State are free from it, and experiments in disinfecting to prevent cattle from spreading the disease when Texas cattle are shipped north, and inoculating cattle to protect from the disease when brought into the State; testing different fertilisers; growing a variety of forage plants, including silage crops; fattening cattle on different rations to determine the most economical method of feeding; testing a variety of food stuffs for the production of butter; testing tile drains on land used for growing farm, fruit, and vegetable crops; testing a variety of grasses, fruits, and vegetables; operating a creamery for investigation in dairy work.

Farmers' Organisations.

In an almost purely agricultural State like Texas the farmers' organised associations are naturally a powerful influence, and

merit a few words of notice in a report like the present. In Texas there are two prominent associations, the Farmers' Alliance and the State Grange, having together an estimated membership of 360,000 persons.

Farmers' Alliance.

Texas enjoys the distinction of having given birth to the Farmers' Alliance, now the strongest and most active organisation of the kind in the State. It is alleged that no movement on the part of the farmers has ever taken such deep root in the heart of the agricultural classes, and spread, not only throughout the State, but throughout the whole nation with such rapid strides as the Farmers' Alliance. The phenomenal growth still continues, acquisitions of numbers to old alliances, and the formation of new alliances being continually reported. State alliances have sprung up in various other States, and a national organisation has been formed.

History of the Farmers' Alliance.

The name "Farmers' Alliance" was assumed in 1875 by an association of farmers in Lampasas county, Texas, who organised themselves into a body for self protection against persons who drove off their stock and otherwise harassed them in the further settlement of the country. In 1878 it had spread over Lampasas and adjoining counties, but was broken up through becoming entangled in politics. In 1879 the Alliance was, however, re-organised by one of the original members at Poolville, Parker County. In this re-organisation the political features which had destroyed the first association at Lampasas were taken out of the declaration of principles, and the order placed on a more non-political basis.

The following is the declaration of principles:—

Principles.

1. To labour for the education of the agricultural classes in the science of economical government, in a strictly non-partisan spirit.

2. To endorse the motto, "In things essential unity, and in all things charity."

3. To develop a better state, mentally, morally, socially, and financially.

4. To create a better understanding for sustaining civil officers for maintaining law and order.

5. To constantly strive to secure entire harmony and good will among all mankind and brotherly love among ourselves.

6. To suppress personal, local, sectional and national prejudices; all unhealthful rivalry and all selfish ambition.

7. The brightest jewels which it garners are the tears of widows and orphans, and its imperative commands are to visit the homes where lacerated hearts are bleeding, to assuage the sufferings of a brother or a sister, bury the dead, care for the widows, and educate the orphans; to exercise charity towards offenders; to construe words and deeds in their most favourable light, granting honesty of purpose and good intentions to others, and to protect the principles of the Alliance unto death.

Membership.

The membership of the order in Texas is estimated at 250,000.

State Grange.

The Patrons of Husbandry, or State Grange, is the oldest

farmers' organisation of wide influence in the State. This order has been the means of accomplishing great good for the farming population, chiefly by keeping in constant view the necessity for a strict observance of economical principles in the management of the farm, avoiding useless and extravagant expenditure, and producing as far as may be all necessary supplies at home. The members of this order, therefore, do not as a rule contribute to the outflow of money from the State for the purchase of farm supplies that can be produced here, and are not in debt to money lenders.

Membership.

There are between 10,000 and 15,000 active members, and a non-affiliating membership of nearly 100,000.

Farmers' commercial agencies.

Besides these two large farmers' associations in Texas, or rather in connection with them, are two other organisations for the purpose of buying supplies and general merchandise for the farmer, (1) The Texas Co-operative Association of the Patrons of Husbandry, and (2) The Texas Farmers' Alliance Commercial Agency. The former is connected with the Grange movement and has a membership of 9,000, and the latter with the Farmers' Alliance.

Agricultural Products.

Total yearly acreage under cultivation, 1888–92.

The total acreage under cultivation in Texas during the years from 1888–92 has been as follows :—

SUMMARY.

Year.	Area.
	Acres.
1888	8,236,592
1889	9,149,067
1890	8,164,921
1891	9,085,166
1892	9,217,936

Value of products, 1888–92.

During the same period, the total value of the agricultural production in the State was estimated as follows :—

Year.	Value.
	Dollars.
1888	100,543,479
1889	110,628,878
1890	99,704,554
1891	127,024,205
1892	119,253,858

Number of farmers and tenants.

The estimated number of farmers in 1892 was 250,844, and of tenants 95,218.

Cotton. Cotton, as is well known, forms the great bulk of the agricultural produce of Texas, and is year by year increasing in importance. Cotton plantations that since the Civil War had remained unworked, owing to want of negro labour, are again being planted, and there is no doubt that the crop of Texas, already about one-third of the total crop in the United States, will continue to grow larger and larger.

Brief history of cotton production in the United States. Before going into the details of the cotton production of Texas, a short history of cotton growing in the United States in general will no doubt prove interesting. The following facts and figures are taken from a highly interesting article published some little time ago by the "Manufacturers' Record":—

"Just 100 years ago, the total cotton crop in the South was 20,000 bales, but by 1820 this had increased to 400,000 bales. Under this rapid gain prices gradually declined from 44 c. per lb. in 1801, to 13½ c. per lb. in 1839.

"With prices ranging 13 c. to 44 c., and averaging for 40 years, from 1800–39, a fraction over 17 c. per lb., cotton cultivation was so profitable that we cannot wonder at the disposition of the people of the South to concentrate their efforts more and more on cotton cultivation to the exclusion of industrial interests. Beginning with 1840 there came a period of extremely low prices, and the cotton States suffered very much from this decline. In that year the average New York prices dropped to 9 c., a decline of 4 c. from the preceding year, and this was followed by a continuous decline until 1846, when the average was 5·63 c., the lowest average price ever known to the cotton trade. Even in 1891–92, when an enormous surplus of cotton following the depression that succeeded the Baring failure forced prices to what many claimed was the lowest on record, the average of New York was 7·50 c., or nearly 2 c. higher than in 1846. Moreover in 1846 the seed was without value, while in 1891–92 the sale of seed added almost 1 c. per lb. to the value of the crop, and transportation was very much cheaper than in 1846. In 1847 the crop was short and prices advanced sharply, only to drop back to 8 c. and then to 7¼ c., making the average for the decade, from 1840–49, the lowest ever known in the cotton trade."

After giving in detail the statistics of production, consumption, and prices for each year since 1840, the "Manufacturers' Record" says:—

"A study of the foregoing figures will show that 7 years of successively increasing crops, as from 1885-86 to 1891–92, was unprecendented in the history of trade. It is doubtful if any leading crop raised can show such an unbroken increase for 7 years. Jumping from 5,700,000 bales in 1884–85 to 6,500,000 bales in 1885–86, there was practically no halting, as the variations in 2 years were too small to be noticeable, to 9,035,000 bales in 1891–92, a gain of 3,300,000 bales, or nearly 60 per cent. advance in 7 years. It ought not to have been expected that consumption could keep pace with such an increase. Fortunately there came a break, and we have now had two short crops. This will help to reduce the enormous stocks that have over-weighted the market

for several years. With surplus stocks worked off a fresh start can be made, and if next year's crop is moderately small the cotton trade of the world will then be on a sound basis for higher prices, because consumption will then have overtaken production.

"In 18 years cotton has brought into the South over 5,700,000,000 dol., a sum so vast that the profits out of it ought to have been enough to greatly enrich that whole section. Unfortunately, however, the system which the poverty following the war developed, of raising cotton only and buying provisions and grain in the west, left at home but little surplus money out of the cotton crop. The west and north drained that section of several hundred million dollars every year, because it depended upon them for all of its manufactured goods, as well as for the bulk of its foodstuffs. Hence of the enormous amount received for cotton very little remained in the south. The increase in diversified farming, the raising of home supplies, the development of trucking (*i.e.*, vegetable farming), and the building of factories are all uniting to keep at home the money which formerly went north and west. Whether the cotton raiser himself be getting the full benefit of this or not, the south at large is necessarily doing so.

"The figures given in the foregoing tables show that the lowest average yield per acre for the 17 years under review was 145⅝ lbs. in 1881, and the highest 209⅝ lbs. in 1891. Had the yield per acre in 1891 been as low as in 1881, the crop would have been less than 6,700,000 bales instead of 9,035,000 bales.

"From 1840–49 the average price in New York was 8 c. per lb., a lower average for 9 years than any single year since has shown except 1891–92.

"The importance of cotton in our foreign trade relations can be appreciated from the simple statement that since 1875 our exports of this staple have been valued at 3,800,000,000 dol., while the total exports of wheat and flour combined for the same period have been 2,500,000,000 dol., showing a difference of 1,300,000,000 dol., or over 50 per cent. in favour of cotton. Moreover, during the same period we have exported about 200,000,000 dol. of manufactured goods, making the full value really 4,000,000,000 dol. Compared with the export of wheat, flour, and corn combined, the value of which since 1875 has been 3,100,000,000 dol., there is a difference in favour of cotton of 900,000,000 dol. Going back to 1820 it is found that the total value of wheat and flour exported for the last 74 years is 3,913,000,000 dol., or 100,000,000 dol. less than the value of the cotton exported during the last 18 years."

Cotton acreage.

During the last 6 years the total number of acres under cotton in Texas has been as follows:—

Year.	Area.
	Acres.
1887	3,259,972
1888	3,483,181
1889	3,755,934
1890	4,054,830
1891	4,520,310
1892	3,979,073
1893 (estimated)	5,000,000

The production in bales has been as follows :— Cotton production.

Year.	Quantity.
	Bales.
1887	1,123,237
1888	1,243,908
1889	1,573,406
1890	1,692,830
1891	2,026,774
1892	1,848,333

The average yield per acre for each year has been as follows: —1887, ·34 of a bale per acre; 1888, ·38; 1889, ·41; 1890, ·41; 1891, ·4483; and 1892, ·47 of a bale per acre. Average yield.

Thus, though there was a decrease in the number of acres under cotton of 541,237 acres, and 178,441 bales less were produced in 1892 than in 1891, yet the average yield of bales per acre was greater.

A fact worthy of note is that Texas has the largest acreage under cotton, and would, under equal conditions of soil, climate, and seasons, fall below the average production per acre of other cotton producing States. Such, however, is not the case, and the high average production per acre goes far to prove the superiority of the soil and the adaptability of the climate for the production of cotton. It may be, moreover, stated without fear of contradiction, that as a rule no manure or fertilisers are used in Texas, except in cases of experiments, while in most of the other States commercial fertilisers enter largely into the expenses of the cotton planter. High average yield in Texas.

It will be seen by the figures given above that there has been (excepting in 1892 when the falling-off was 541,237 acres) a constant and steady increase in the acreage devoted to cotton growing. This has been partly due to the abandonment of wheat growing in portions of North Texas, and partly to the opening of new plantations in the western and south-western parts of the State. Constant increase in acreage.

The increase of cotton acreage up to 1892 was much greater than the increase of population, showing conclusively the tendency to plant cotton to the exclusion of other crops. This has been Cause of increase.

taken to show that the average farmer thinks he knows best what is suited to the soil and climate and will yield the best return for the capital and labour invested. In addition to this, cotton is a sure money crop, and can be realised on at any time even in the remoter districts of the State, and this fact is another great inducement to the average farmer to plant cotton.

Diversified crops.

Strenuous efforts, however, are being made to induce the farmers to diversify their crops to a greater degree, so as to prevent over production of cotton and consequent low prices, as well as to grow grain, &c., for home consumption. The decrease of cotton acreage in 1892 and the increase of acreage in Indian corn and wheat would appear to show that the advice of the leading farmers and agricultural press has borne fruit.

Character of Texas cotton.

Texas cotton has considerably improved in grade of late years. It was formerly characterised by being low in grade and coarse in staple, but owing to the more extended cultivation of higher ground the grade has greatly improved.

Chief cotton-producing counties in Texas.

The chief cotton producing portion of the State is situated in the centre round about the town of Waco. The largest crops were gathered in the following counties, all of them producing over 25,000 bales of cotton in 1892 :—

County.	Quantity.
	Bales.
Ellis	59,021
Fayette	54,831
Hill	49,000
Bell	44,900
Collin	44,807
McLennan	40,529
Fannin..	39,894
Falls	38,274
Coryell	31,904
Guadalupe	31,520
Grayson	31,349
Dallas	29,008
Lamar	29,734
Lavaca..	27,765
Limestone	27,337
Colorado	26,418
Bastrop	26,122
Milam	25,989
Austin..	25,510

Cotton blight.

Much time and attention is being devoted to the discovery of the cause of cotton blight, or rot root, which damages the crop and causes considerable loss every year, but so far no satisfactory conclusions have been reached on the subject.

Boll worm.

A more important question even yet is the effort to discover a cheap and effective destroyer for the insect commonly called the boll worm. The value of a remedy for this worm will be seen at a glance from the following estimate of the losses from that source for 1887–89 :—

Year.	Quantity.	Value.
	Bales.	Dollars.
1887..	297,499	11,897,960
1888..	342,560	13,359,840
1889..	428,572	17,578,632

Loss from boll worm.

The boll worm is stated to destroy cotton at all stages of growth, from the formation of the square and appearance of the bloom, to the boll about to open. It is equally destructive in its effects at all times.

To summarise briefly: Cotton is the leading crop and is grown generally throughout the agricultural portions of the State. The yield of the crop is generally good, and as a rule about one-fourth and sometimes a greater proportion of the cotton raised in the United States is produced in Texas. The time for planting cotton over the State varies with the latitude, and depends to some extent on the severity of the winter and spring weather. Cotton planting is generally under good headway over South-west Texas and the Coast District by March 28, while over the northern portion of the State the greater portion of the crop is planted between April 8 and 16. The seeds after being planted, with favourable weather, germinate and come up in about 8 days, and with warm weather and light rains the plant grows off rapidly. Cotton commences blooming over the south-western portion of the State about June 1, while blooming takes place 10 to 20 days later over the northern portion of the State. On an average picking commences over the south and south-western portion of the State by August 1, while over the northern portion, picking is from 2 to 3 weeks later. There are three crops of cotton raised, bottom, middle, and top crops, and the plant continues growing until the first killing frost, which occurs generally over the northern portion of the State about the last of October, while over the southern portion this does not occur until about the middle of December, and picking generally extends through December and sometimes into January.

Time for planting cotton.

Commencement of blooming and of picking.

On examining the effects of the weather on the production of cotton throughout the State, it is observed first that the greatest yield per acre is generally in years when the precipitation is well distributed, and both temperature and precipitation vary but slightly from the normal from the time the crop is planted until the bolls are well matured, and followed by a deficiency in precipitation from the time picking has commenced until it is well advanced. Dry weather during the cotton picking season enables the farmer to pick the crops closer, and increases the yield per acre generally. The conditions which prevail previous to the time cotton is planted have some effect on the crop. A marked deficiency in the moisture supply in the ground, unless followed by exceptionally favourable weather, causes a decrease in the yield. The greatest damage to the cotton crop has resulted from

Effect of weather on cotton crop.

Damage by rain.

heavy rains in April and May, especially in the latter month, when the crop has been badly washed. The next greatest damage has resulted from cool weather in April and May, followed by a drought about the time cotton commences blooming. Cotton is, also, damaged more or less every year by the boll worm and other insects which injure the crop in all stages of its growth, from the formation of the square and appearance of the bloom until the boll is ready to open, but the damage to the crop from these is more marked in wet seasons.

Indian corn, or maize. Increased cultivation. Date of planting.

The cultivation of maize is being carried on more extensively during the past few years, as is shown by the acreage in cultivation in 1892 and 1893, which is about 500,000 acres more than that planted in 1890. The average date of planting varies in the different sections of the State; over the southern portion it is about March 9, while over the northern portion planting is generally under good headway by March 28. The plant thrives and grows off nicely with warm weather and sufficient precipitation. On an average maize commences blooming or tasseling over the southern portion of the State by the 8th of May, while the time of blooming is from 2 to 3 weeks later over the northern portions. The average date on which gathering commences ranges from August 12 over the Coast District, to August 28 over north Texas. Some of the crop is occasionally left standing in the fields until the winter, and by so doing the grain is often damaged, and is not as good as when gathered early after maturing.

Date of gathering.

Effects of weather on maize crop.

On examining the effects of the weather on the production of maize for different years it was found that the greatest damage to the crop has resulted from cold weather in April with frost, and heavy rains in April and May. It is found that cold weather in April damages the crop more or less every year over the northern portion of the State, and means of protecting this crop from these northers in April will be studied further along. Heavy rains in April and May reduce the crop generally by washing it up, and drowning the plant out in low lands. Dry weather during the latter part of May and in June, the time when the ear is forming, has an injurious effect on the crop. It is also observed that years with good rains well distributed in the month of June nearly always ensures a good crop of maize generally throughout the State. It has been learnt from practical experience that no matter how favourable a season there may be at the time maize is planted and while it is growing off, that a dry spell at the time it commences earing reduces the yield considerably; and conversely, that years comparatively dry at the time of planting and during early growth, but with sufficient amount of precipitation well distributed from the time maize commences blooming or tasseling until the ear is well matured, ensured the production of a good crop generally.

In examining the effect of cold weather and frost in April on the production of maize, it is believed that the crop can be protected, and the expenses involved would be more than returned by the increase in production. As a rule the temperature only

falls sufficiently low once a year after the crop is planted to damage the crop to any great extent, and this is generally foretold by the forecast issued by the United States Weather Bureau from 12 to 36 hours before the norther reaches the State.

The acreage under Indian corn in Texas during the last 6 years has been as follows :— Maize acreage.

Year.	Area.
	Acres.
1887	2,929,266
1888	3,224,104
1889	3,042,148
1890	2,906,493
1891	3,166,353
1892	3,424,444
1893 (estimated)	3,492,933

The following was the crop production in the same years :— Production of maize.

Year.	Quantity.
	Bushels.
1887	55,775,745
1888	76,607,312
1889	67,629,851
1890	41,812,904
1891	63,135,004
1892	77,727,202

The average production of bushels per acre in these 6 years has been 20·37 bushels per acre, the highest having been 23·76 bushels in 1888, and the lowest 14·38 bushels in 1890. Average yield per acre.

While values of crops are difficult to estimate correctly there is no doubt that cotton pays better than Indian corn. From figures given in the tables annexed to this report, it will be seen that the average value per acre of the cotton crop from 1887–92 was (including cotton seed) 16 dol. 22 c. per acre, whilst that of Indian corn and wheat was only 8 dol. 61 c. and 7 dol. 96 c. per acre respectively. Maize crop. Values as compared with cotton and wheat.

There was an increase of 258,091 acres in maize in 1892 as compared with 1891. The average production was 22·60 bushels per acre, which was 2·67 bushels above the average of the previous year, and within 1·60 bushels of the average of the maize-growing States of the Union. This is a good showing when it is considered that Texas is not classed among maize-producing States as a source whence the demand for Indian corn may be supplied. Increased production of maize.

The estimated average annual consumption of maize throughout the States is given as 28 bushels per capita. On the basis of this calculation Texas comes out as follows :— Surplus over home consumption.

	Quantity.
	Bushels.
Bushels produced	77,727,202
„ necessary for home consumption ..	42,594,644
Surplus	25,594,644

Maize-growing counties.

The chief maize-growing counties in Texas are Bell, Collin, Cooke, Coryell, Dallas, Denton, Ellis, Falls, Fannin, Fayette, Grayson, Hill, Hunt, Johnson, Lamar, McLennan, Montague, Navarro, Parker, Tarrant, Washington, Williamson, and Wise, all of which produced over 1,000,000 bushels of maize each in 1892.

Wheat not cultivated very extensively.

Wheat is not cultivated very extensively over the State on account of the production of other crops which pay the producer better for his labour, and the only sections where wheat is grown is over the Panhandle, north and central portions of the State.

Winter wheat the only kind. Date of sowing.

Winter wheat is the only kind cultivated in these sections, and the average time of sowing ranges from October 20 in North Texas and the Panhandle to October 24 over Central Texas. Wheat with favourable weather goes off well and generally commences heading about May 5, when there is a fair stand, as this has something to do with the heading and ripening of the crop.

Date of harvesting. Average yield.

The average date of harvesting is about June 9. The average yield for the 8 years is 10·9 bushels per acre, which is a fair yield and greater than any other State south of the 38th parallel of latitude east of the Rocky Mountains.

Effects of weather on wheat crop.

The weather as a general rule is very favourable for the crop. The dry weather, which occurs occasionally after wheat is sown in the fall, causes the plant to come up and grow off poorly, and thereby injures the crop to some extent, as it keeps it from spreading and reduces the yield generally. A warm spring results in wheat growing rapidly, which increases the probability of the crop being injured by cold weather late in the spring, although wheat will stand a lower temperature than the other products under consideration, yet it requires an average temperature of about 55 degrees before it will mature. Heavy rains in April and May injure the crop to some extent, especially if they occur about the time the plant is heading. The crop is sometimes slightly damaged by insects in April and May, but, as a rule, they do not injure the wheat as bad as they do in some States farther north. It is observed that years with temperature and precipitation about normal, with the precipitation well distributed, ensures a fair crop generally.

Wheat acreage.

The following was the acreage of the last 6 years:—

Year.	Area.
	Acres.
1887	520,219
1888	386,120
1889	402,154
1890	359,440
1891	442,337
1892	570,798
1893 (estimated)	559,382

The total yearly production for the same period was as follows :— Wheat production.

Year.	Quantity.
	Bushels.
1887	5,174,454
1888	4,850,002
1889	5,117,534
1890	2,365,253
1891	6,978,385
1892	6,553,575

The average number of bushels per acre was :— Average yield of wheat.

Year.	Quantity.
	Bushels.
In 1887	9·94
1888	12·56
1889	13·0
1890	6·58
1891	15·34
1892	11·30

The average production per acre in 1892 shows a decrease from 1891, being 11·30 bushels, as against 15·34 bushels, and there was also a decline in the average price, from 75 c. per bushel in 1891, to 55 c. in 1892. This is in accordance with the tendency all over the States where lower prices and consequent diminution of gross returns in wheat per acre have been very marked during the last 10 years. Comparison of 1892 and 1891.

As will be remarked there was an increase of acreage in 1892 over 1891 of 570,798 acres, as against 442,337 acres.

There has been a constant decrease of wheat planted in the northern part of Texas, where up to 1891 the bulk of the wheat produced in the State was grown. This decrease has been off-set by the opening of new farms in the Panhandle, which is fast becoming the granary of the State. The soil and climate there are admirably adapted to wheat culture, and it is hoped that ere long, Decrease of wheat in North Texas. Increase in Panhandle.

with favourable circumstances, that part of Texas will supply enough wheat for home consumption and also for exportation.

Deficiency of home wheat to supply Texas.

The amount of wheat consumed per capita throughout the United States is estimated at 4⅔ bushels. Under this calculation 10,432,442 bushels were necessary for Texas consumption in 1892, whereas only 6,553,575 bushels were produced, leaving 3,878,867 bushels to be imported.

Chief wheat-growing counties.

The chief wheat-growing counties in 1892 were Collin, Cooke, Dallas, Denton, Grayson, Greer, Tarrant, and Wichita, most of them in the district round Dallas and Fort Worth.

Oat crop.

Oats are cultivated successfully throughout the State, except along the immediate coast, where other crops are more valuable.

Dates of sowing.

The average date of sowing ranges from February 6 over South-West Texas to February 18 over North Texas. The crop with favourable weather grows off nicely and does exceptionally well. The stalk commences heading out over the southern portion of the State about May 8, and is from 1 to 3 weeks later in heading out over North Texas. The date of harvesting ranges from June 9 over South-West Texas to June 19 over North Texas. The average yield for 8 years is 26·6 bushels per acre, which is an exceptionally good production, and is about the average yield of the crop for the United States since 1880. This shows that Texas is by no means behind other States in the production of this valuable cereal. The yield in some sections over the eastern and central portions of the State is very good, and by using fertilisers it has been proved that the yield can be increased to 100 bushels per acre with favourable seasons, and over the north-west portion of the State such yields are not exceptional.

Dates of harvesting.

Average yield.

Effects of weather on oat crop.

In examining the effects of the weather on the cultivation of oats in the State, it is observed first that the greatest damage to the crop has resulted from heavy rains in March, April, or May, washing the plant up in many sections and thereby diminishing the yield. Freezing weather in April over the northern portions of the State has damaged the crop in a few years out of the eight to some extent. One pleasing feature in the cultivation of this crop is that it is rarely injured to any great extent by insects, and with favourable weather a fair yield can always be expected. It is also noticed that the yield of the oats depends, to a great extent, on the amount and distribution of rainfall during the latter part of April and in May, and in years with these conditions favourable a large yield is generally harvested.

Acreage under oats.

Oats form the third crop in point of importance in Texas, coming in between maize and wheat. During the 6 years ending with 1892 the acreage has been as follows:—

Year.	Area.
	Acres.
1887..	561,021
1888..	567,468
1889..	547,849
1890..	347,033
1891..	473,709
1892..	703,004
1893 (estimated)	577,443

The total annual production during the same period was as follows:— Annual production.

Year.	Quantity.
	Bushels.
1887..	13,490,925
1888..	17,845,666
1889..	14,988,662
1890..	6,683,074
1891..	13,406,853
1892..	24,595,169

Average yield per acre. The average yield per acre has varied from 19·25 bushels in 1890 to 34·98 bushels in 1892, the mean being 27·56 bushels during 1887–92.

Consumption of oats curtailed by amount of pasture land in Texas. It is not possible to determine exactly whether the supply of oats exceeds the demand in Texas, but the vast amount of open and enclosed pasture land in the State curtails considerably the consumption.

Chief counties producing oats. The chief counties producing oats are Bell, Bosque, Clay, Coleman, Collin, Cooke, Coryell, Dallas, Denton, Ellis, Erath, Fannin, Grayson, Greer, Hamilton, Hill, Hopkins, Hunt, Johnson, Kaufman, Lamar, Lampasas, Limestone, McLennan, Montague, Navarro, Parker, Tarrant, Williamson, and Wise, all of which grew over 250,000 bushels each in 1892.

Little demand for rye. Annual production. Rye is sown chiefly for pasturage in Texas, there being little, if any, demand for it in local markets. The production has ranged from 87,051 bushels to 43,371 bushels in the last 6 years. In 1892 it was 52,275 bushels from 3,048 acres.

Barley not important as a crop. Annual production. Like rye, barley is grown chiefly for pasturage in Texas, and the crop is of small importance. In fact it is not what might be produced under different conditions if necessary. The yield represents only what is harvested after the pasturing season is past. There were 5,350 acres in Texas under barley in 1891, and 9,527 acres in 1892, the product being respectively 110,787 bushels and 78,672 bushels.

Acreage under millet: annual production. The acreage under millet averages nearly 50,000 acres. During the years from 1887 to 1892 the production has been as follows:—

Year.	Quantity.
	Tons.
1887..	75,435
1888..	117,893
1889..	109,395
1890..	47,275
1891..	52,853
1892..	52,549

The highest average production per acre was 1·79 tons per acre in 1889; the lowest, 1·38 tons in 1892. The average yield per acre in dollars during the last 6 years is about 12·20 dol. It is chiefly grown in Bell, Collin, Coryell, Greer, Hill, McLennan, and Navarro counties.

Hay.

Under this heading may be included sorghum cane cut for hay, cultivated hay, and prairie hay, standing in value per acre in the order named.

Sorghum cane hay.

Sorghum cane hay is the most profitable, showing the highest yield per acre. It is less affected by drought than any other cultivated product, so it is said, and in favourable seasons two crops

Production in 1892.

can be grown. There were in 1892, 47,013 acres planted with sorghum cane for hay, producing 127,882 tons, an average of 6·05 tons per acre. The value was estimated at 16·22 dol. per acre.

Average crop.

The crop has varied greatly during the past 6 years, jumping from 10,529 tons in 1887 to 197,456 tons the following year.

Cultivated hay.

Cultivated hay comes next in value. During the period from

Average acreage and production.

1888 to 1892 the average acreage planted has been about 30,000, yielding on an average 73,000 tons per annum, or nearly 2½ tons per acre. The acreage in 1892 was 32,705, production 106,259 tons,

Figures for 1892.

average 3 tons per acre, value on the average, 10·50 dol. per acre.

Prairie hay.

Prairie hay, although largest in acreage, is, as may be expected, least in value, the production being very little over 1 ton per acre

Average value of yield per acre.

planted, and the average value per acre of the yield being during the last 6 years, 6·56 dol. There is of course much more acreage under prairie or uncultivated hay than under all the other kinds combined. The acreage during the last 6 years is given as follows:—

Yearly acreage.

Year.	Area.
	Acres.
1887..	136,046
1888..	182,240
1889..	141,169
1890..	183,973
1891..	179,163
1892..	175,053

Sweet potatoes.

This is a crop of considerable importance, the demand for the pure yellow yam having never been fully supplied. This variety,

while not so prolific as others, is readily sold, and bears a high market value. During the 6 years from 1887 to 1892 the average acreage under sweet potatoes has been about 36,000 acres, the average yield per acre being over 132 bushels. The value of the crop has been high, 53·39 dol. per acre on the average from 1887 to 1892. Average acreage and yield. Value of crop. Figures for 1892.

There was an increase in acreage from 29,928 in 1891, to 38,567 in 1892, and a corresponding increase in the total crop of from 3,012,382 bushels to 4,675,513 bushels. The average yield per acre in 1892 showed a decrease however, being only 121·23 bushels per acre, as against 181 bushels in 1891, but owing to better prices the crop was more remunerative.

The production of Irish potatoes for the general market in Texas is not undertaken, owing to the inability of preserving them for any length of time in this climate. The local markets are supplied with them when the crop first matures, but beyond this their cultivation is adjusted to the demands of the farm growing them. Texas soil is well adapted to the production of Irish potatoes, the average yield per acre being 94·10 bushels, as against 87·7 bushels per acre in the United States generally. Irish potatoes: a small crop. Average yield per acre.

The annual acreage under Irish potatoes during 1887 to 1892 was about 6,000 to 8,000 acres only, and the average total production about 720,000 bushels. Average annual acreage.

There was an acreage of 7,448 acres in 1892, producing 575,039 bushels, as against 8,050 acres, producing 650,075 bushels in 1891. The crop is usually estimated to pay about 65 dol. per acre on the average. Figures for 1892.

One of the most promising fields for development in Texas is the vast area of alluvial soil in the middle, eastern, and southern parts of the State adapted to the growth of sugar-cane. This territory is variously estimated in size, but it has been concluded from accurate information that there is not less than 1,000,000 acres in South Texas alone where sugar can be successfully grown every year, and on the river bottoms and along many of the smaller streams it is grown successfully as high as the thirty-third parallel. Promising field for sugar-cane industry.

Estimating the area in which sugar-cane can be profitably grown at only 500,000 acres, and valuing the product at 100 dol. per acre, a fair idea of the possibilities of development in this industry may be gained. The crop would thus be worth 50,000,000 dol., and sugar is as staple an article as cotton, and less liable to fluctuation in price. The supply in the United States is below the demand, and in consequence there is always a market for the product.

The chief difficulty in the way of developing the sugar-cane industry in Texas is the cost of the plant necessary, which practically limits the advantages to be gained to men of wealth, the machinery costing from 60,000 dol. to 100,000 dol. Difficulty in development of industry owing to cost of plant.

Co-operation has been suggested as a remedy for this, also the purchase by the large mill owners of the cane grown by small planters. Co-operation necessary.

Turning to the statistics of the sugar and sorghum cane crops, Average acreage.

it will be found that the average acreage under sugar-cane during the years from 1887 to 1892 has been about 14,300 acres, and under sorghum cane about 22,000 acres. During the same period the crop of sugar-cane has produced an average of nearly 54,000 barrels of syrup annually, while that of sorghum cane has been nearly 60,000 barrels.

Average production.

Average value of crop.

As was remarked before, the sugar-cane crop is a paying one, the average return per acre from both sugar and syrup having been during the period 1887–92 about 76 dol.

Figures for 1892.

In 1891 the total value of the sugar and syrup crops of both kinds was estimated at 1,260,650 dol., and the value per acre 88·62 dol. In 1892 the corresponding figures show 1,357,254 dol. and 75·59 dol. respectively.

Production and value of honey, 1891 and 1892.

The production of honey, though very paying, has received but little attention in Texas. In 1891, 183,928 stands produced 2,581,116 lbs., valued at 262,303 dol. In 1892, 152,716 stands produced 2,377,413 lbs., valued at 250,263 dol.

Good work of Horticultural Society.

Through the efforts of the Texas Horticultural Society a good work has been done in educating people in this important branch of agriculture. It has been fully demonstrated that the growing of fruit, vegetables, and flowers will pay much better than cotton or any of the leading products of the soil. The State is so large, the climate so varied, that localities can be found where every kind of fruit can be successfully grown.

Acreage in orchards, 1891 and 1892.

Value of fruit crop.

The total acreage in orchards in Texas was, in 1891, 68,654, and the value of the fruit crop, estimated at current prices, 1,706,195 dol. In 1892 the acreage was 70,075, an increase of 1,421 acres over 1891; the value of the crop, however, decreased to 1,612,381 dol.

Peach crop.

The most important fruit crop in Texas is the peach crop. From 1888 to 1892 the average acreage in peaches has been about 55,000 acres. In 1892 it was 53,848 acres, an increase of nearly 2,000 acres over 1891. During the 5 years from 1888 to 1892 the value of the peach crop averaged about 1,200,000 dol. yearly. In 1892 it was 1,283,956 dol. Texas enters the western markets with peaches as early as June. They can be sold at 6 dol. per bushel, and this State has the almost entire monopoly of the western and north-western peach market until nearly August.

Melons.

The next crop in importance to peaches is the melon crop. During 1888 to 1892 the average acreage under melons was about 12,500 acres, and the average value of the crop, 464,000 dol. The acreage in 1892 was 15,067, and the value of the crop 427,525 dol.

Apples.

Apples grow all over North Texas in great variety and come to perfection. During the past 5 years the average acreage under apples has been about 10,000 acres, and the average value of the crop 256,000 dol. The acreage in 1892 was 9,882, and the value of the crop 201,459 dol.

Grapes.

The European varieties of grape are chiefly grown near Rockport, and can be successfully cultivated from Port Lavaca to Brownsville. They are ready for market early in June, and fetch on an average 23 c. per lb. They yield from 30 lbs. to 100 lbs. per

vine, and are grown without any expense for wires or training in any way. The American variety of grape flourishes all over the State, and with proper attention yields over 100 dol. per acre. The Coast District of Texas is said to be particularly favourable to American grapes, such as the Delaware and Concord varieties, especially as the dreaded black rot is little known.

The average value of the grape crop in Texas from 1888 to 1882 was about 140,000 dol.; in 1892 it was 153,901 dol.

Pears. This is an increasing and paying crop. The acreage has risen steadily from 878 in 1888, to 2,950 in 1892. The average value of the crop during these 5 years was 56,000 dol. In 1892 it was 70,960 dol. As a specimen of what can be done there may be quoted a pear orchard in Galveston county. The proprietor last year sold 9,127 bushels off 13 acres only; he paid out 100 dol. nearly per acre for services and harvesting expenses, and yet the crop netted him 5,245 dol.

Plums. Plums are grown extensively in Texas and pay well. The average acreage from 1888 to 1892 was 2,800 acres, and the average yearly value of the crop about 50,000 dol. In 1892 the acreage was 3,399, and the value of the crop 56,006 dol.

Average acreage, 1888–92. During the 5 years from 1888 to 1892 the average acreage in gardens all over the State was about 33,000 acres. In 1892 it had risen to 48,211 acres, an increase of nearly 14,000 acres over 1891.

Average yearly value of crops. During the same 5 years the average annual value of the garden crops produced was about 2,500,000 dol. In 1892 it was 2,562,048 dol.

Early Texas vegetables. Texas enters the markets with vegetables as early as February. At that time the vegetables of the Coast Districts are ready, and from then on the whole State produces them. Texas is probably 30 days to 60 days earlier than other States in the vegetable markets of the west and north-west; while other States are forcing their vegetables in green houses, here they are growing out of doors to perfection.

While most vegetables and garden fruit pay well, celery, strawberries, blackberries, and cabbages are especially remunerative, and can all be made profitable industries.

Celery. Celery grows in Texas wherever tried, and comes on the market just as the northern celery disappears.

Strawberries. Strawberries are about 30 days in advance of all competition. The sandy land of East Texas is particularly well adapted to their culture, and returns for some years have shown 1,000 dol. net for every 3 acres planted.

Blackberries The blackberry grows over even a more extensive territory than the strawberry, and has been found by some more profitable.

Cabbages. Cabbages of a fine variety chiefly grow on the coast, yielding 400 head to the acre; they are planted in September, and come to market in February.

Live Stock.

Importance of ranching industries.

As is generally known, the sheep and cattle ranching industries of Texas are immense. The vast plains of the State afford unlimited pasture for both sheep and cattle, the chief drawback being want of water. Of late, ranching has been less profitable than formerly, and to-day a well-stocked sheep or cattle ranch can be bought for very much less than a few years ago. Notwithstanding this depression the industry is a vast one, and the amount of capital invested enormous.

Ranching less profitable than formerly.

Texas first in number of live stock.

Texas stands at the head of the States of the Union in the number of her live stock. There are more sheep, more cattle, more horses and mules than in any other State or territory.

Sheep.

The total number of sheep in Texas in 1891 was 3,564,469, and in 1892, 3,366,257. The number has been decreasing for some years past, and the amount of wool clipped has diminished in proportion. In 1891, 2,978,459 sheep were sheared, yielding 15,499,979 lbs. of wool. In 1892, 2,539,054 sheep were sheared, the yield being 13,626,629 lbs. of wool. If the figures for 1888 were glanced at, it would be found that no less than 3,860,034 sheep were sheared, the amount of wool clipped being 18,721,693 lbs. These figures show the great decrease at present in the sheep ranching business.

Variety of Texas sheep.

Average yield per head.

Imported sheep not a success.

The Texan sheep are chiefly the Spanish merino variety crossed with Mexican. Their average yield per head is about 5 lbs. per annum. They generally run in herds of about 1,500. Cotswold, Southdown, and Leicester sheep have from time to time been imported to try the effect of crossing them with the Texan sheep, but such experiments have never proved successful, as the imported sheep do not stand the climate, and will not "herd" as it is called.

Cattle.

The number of cattle in Texas, though still greater than in any other State, has also decreased of late years. In 1891 the number was 6,856,338, and in 1892, 6,337,428.

Kind of stock.

The stock is chiefly long horned Texas cattle, greatly improved by crossing with imported Durham, Jersey, and Holstein bulls.

Formerly it was the custom to allow the cattle to come to maturity here and then ship or drive them for sale to Chicago. Nowadays they are taken when yearlings to the Indian Territory, Montana, and Wyoming, as it has been found that they gain much more weight at maturity when left a year or two in the colder climate of the above-named States.

Horses.

The majority of the horses are of the kind known as "bronchos," the descendants of the wild horses of the plains, which stock is again derived from those brought over by Cortez. They are small, wiry, not much in appearance, but untiring and capable of covering great distances at their ordinary pace, which is a hand gallop or canter.

There are of course many horses of other breeds in Texas, especially in and near the towns, but the broncho is the Texan horse

"par excellence." In 1891 there were 1,452,306 horses and mules in the State, and in 1892, 1,690,135, a considerable increase.

The mule is chiefly used for draught purposes owing to his superior height and strength.

In 1892 there were 12,972 donkeys, 268,390 goats, and 1,155,284 hogs in the State. Other live stock.

Description.	1887.	1888.	1889.	1890.	1891.	1892.
Cotton—						
Acres planted	3,259,972	3,483,181	3,755,934	4,054,830	4,520,310	3,979,073
Produce, in bales	1,123,237	1,243,908	1,578,406	1,692,830	2,026,774	1,848,333
Average product per acre, in bales	·34	·38	·41	·41	·4483	·47
Total value of crop, in dollars	45,127,676	48,466,412	64,688,795	71,031,282	69,439,476	69,702,589
Average value per bale, in dollars	40·17	38·96	41·20	41·95	34·75	37·70
Average value per acre (including cotton-seed), in dollars	13·66	12·20	20·17	16·64	15·57	19·11
Indian corn or maize—						
Acres planted	2,929,266	3,224,104	3,042,148	2,906,493	3,166,353	3,424,444
Bushels raised	55,775,745	66,607,312	67,629,851	41,810,904	63,135,004	77,727,202
Average bushels per acre	19,004	23·76	22·50	14·38	19·93	22·60
Total value, in dollars	25,849,652	26,211,177	24,722,296	28,365,325	28,429,125	28,098,789
Average value per bushel, in cents.	46	34	·36	67	45·02	·364
Average value per acre, in dollars	8·75	8·08	8·10	9·61	8·91	8·20
Wheat—						
Acres planted	520,219	386,120	402,154	359,440	442,337	570,798
Bushels raised	5,174,454	4,850,002	5,117,534	2,365,253	6,978,385	6,553,575
Average bushels per acre	9·94	12·56	13	6·58	15·34	11·30
Total value, in dollars	3,768,672	4,774,429	3,284,387	1,989,207	5,244,303	3,614,391
Average value per bushel, in cents.	72	71	65	84	75	55
Average value per acre, in dollars	7·15	8·92	8·45	5·52	11·37	6·33
Oats—						
Acres planted	561,921	567,468	547,489	347,033	473,709	703,004
Bushels raised	13,490,925	17,845,666	14,198,662	6,685,074	13,406,853	24,595,169
Average bushels per acre	24·04	31·45	27·31	19·25	28·30	34·78

AGRICULTURAL Statistics of Texas during the Years 1887–92—continued.

Description.	1887.	1888.	1889.	1890.	1891.	1892.
Oats—continued—						
Total value, in dollars	4,453,682	4,774,429	3,737,409	3,274,692	5,182,626	6,019,499
Average value per bushel, in cents.	33	27	25	48	46	24·86
Average value per acre, in dollars	7·93	8·49	6·82	9·34	10·94	8·54
Barley—						
Acres planted	11,570	6,549	5,642	2,846	5,350	9,527
Bushels raised	172,989	159,996	124,089	54,341	110,787	78,672
Average bushels per acre	14·95	29·83	22	10·90	20·70	8·25
Total value, in dollars	70,125	89,227	59,375	37,700	71,152	66,096
Average value per bushel, in cents.	45	45	48	30	64	84
Average value per acre, in dollars	6·72	13·42	10·56	5·27	13·02	6·93
Rye—						
Acres planted	35,905	7,549	6,068	2,890	3,584	3,048
Bushels raised	50,009	87,051	83,008	43,371	45,489	52,275
Average bushels per acre	1·39	11·53	14	15	12·70	17
Total value, in dollars	43,495	66,071	55,717	36,655	33,529	24,237
Average value per bushel, in cents.	86	76	67	85	73·70	46
Average value per acre, in dollars	1·19	8·76	9·38	12·75	9·25	7·95
Millet—						
Acres planted	50,628	66,999	60,929	32,874	35,985	52,549
Tons raised	75,435	117,893	109,395	47,275	52,853	72,628
Average tons per acre	1·47	1·76	1·79	1·43	1·46	1·38
Total value, in dollars	684,750	822,403	737,234	405,987	425,792	543,303
Average value per ton, in dollars	9·07	6·97	6·74	9·01	8·05	7·61
Average value per acre, in dollars	13·33	12·27	12·06	12·87	11·82	10·31

Agricultural Statistics of Texas during the Years 1887-92—continued.

Description.	1887.	1888.	1889.	1890.	1891.	1892.
Sweet potatoes—						
Acres planted	27,467	45,685	41,526	33,643	29,928	38,567
Bushels raised	3,823,563	5,127,729	5,191,295	3,902,382	3,012,382	4,675,513
Average bushels per acre	139·27	112·23	125	115	115	121·23
Total value, in dollars	1,765,322	2,264,890	2,329,795	1,977,639	1,503,764	2,785,983
Average value per bushel, in cents.	46	44	48	50	49	48
Average value per acre, in dollars	64·06	49·30	60	57·50	50·24	59·24
Irish potatoes—						
Acres planted	6,834	9,768	6,276	7,307	8,050	7,448
Bushels raised	680,737	1,134,152	651,749	641,178	650,975	575,939
Average bushels per acre	99·60	116·10	104	87	80·75	77·20
Total value, in dollars	453,758	641,957	439,732	540,961	497,641	417,007
Average value per bushel, in cents.	66	56	67	74	76	72
Average value per acre, in dollars	65·73	65·02	69·68	64·36	61·81	55·98
Hay (cultivated)—						
Acres in	..	40,395	37,383	27,530	30,233	32,705
Tons produced	..	94,225	77,310	50,187	46,223	100,259
Average tons per acre	..	2·33	2·07	1·82	1·52	3
Total value, in dollars	..	666,061	566,897	300,584	390,494	343,715
Average value per ton, in dollars	..	7·07	7·33	5·98	8·44	5·42
Average value per acre, in dollars	..	16·47	15·17	10·88	12·91	10·50
Hay (prairie)—						
Acres cut	136,046	182,240	141,169	183,973	179,163	176,053
Tons produced	171,061	226,163	174,403	164,130	184,228	194,150
Average tons per acre	1·25	1·24	1·24	·89	1·28	1·10
Total value, in dollars	1,249,608	1,223,174	976,948	1,289,103	1,147,658	1,062,313

AGRICULTURAL Statistics of Texas during the Years 1887–92—continued.

Description.	1887.	1888.	1889.	1890.	1891.	1892.
Hay (prairie)—continued—						
Average value per ton, in dollars	7·30	5·41	5·56	5·93	6·23	5·47
Average value per acre, in dollars	9·12	6·71	6·89	5·27	6·40	6·00
Sorghum-cane (cut for hay)—						
Acres planted	9,575	58,988	61,396	29,982	41,180	47,013
Tons produced	10,529	197,456	180,679	77,520	90,729	125,882
Average tons per acre	1·09	3·35	2·94	2·58	2·20	2·67
Total value, in dollars	99,724	1,117,807	935,852	533,937	587,019	762,536
Average value per ton, in dollars	9·47	5·66	5·18	6·88	6·47	6·05
Average value per acre, in dollars	10·32	18·96	15·22	17·75	14·25	16·22
Sugar-cane—						
Acres planted	12,055	15,456	15,845	15,416	16,015	13,704
Barrels of syrup produced	43,036	41,237	67,063	63,013	65,133	43,448
Total value of sugar and syrup, in dollars	1,127,829	1,463,226	1,528,649	1,006,616	981,877	693,542
Average barrels per acre	3·56	2·66	4·43	4	4·06	3·17
Average value per acre (sugar and syrup), in dollars	93·00	94·67	96·47	63·88	61·30	50·60
Sorghum-cane—						
Acres planted	26,259	36,476	23,013	9,817	13,519	26,550
Barrels of sorghum produced	44,399	63,484	52,207	19,822	24,703	153,481
Total value, in dollars	655,827	1,049,139	816,904	254,034	427,406	663,712
Average barrels per acre	1·69	1·74	2·26	2	1·82	5·78
Average value per acre, in dollars	25·00	28·76	35·00	25·62	31·61	24·99
Cotton-seed—						
Tons produced	..	621,954	786,703	783,600	974,592	924,167
Total value, in dollars	..	4,353,678	5,506,921	6,229,637	7,830,849	7,393,336

AGRICULTURAL Statistics of Texas during the Years 1887-92—continued.

Description.	1887	1888.	1889.	1890.	1891	1892.
Melons—						
Acres planted		10,137	10,193	11,405	16,243	15,067
Total value, in dollars		384,350	441,964	491,586	576,032	427,525
Grapes—						
Total number of vines		686,444	887,520	791,415	490,546	1,555,754
Total value of crop, in dollars		148,975	164,462	86,975	137,982	138,901
Grasses—						
Acres in		34,081	35,906	31,269	34,851	48,211
Total value of products, in dollars		2,176,726	3,092,877	2,246,127	2,538,093	2,562,048
Peaches—						
Acres in		60,578	62,334	48,007	51,750	53,848
Value of crop, in dollars		1,545,756	1,681,072	418,136	1,289,551	1,283,956
Apples—						
Acres in		10,724	11,568	11,026	11,428	9,882
Value of crop, in dollars		349,115	322,881	148,849	289,856	201,459
Plums—						
Acres in		2,729	2,807	2,126	2,951	3,399
Value of crop, in dollars		59,549	64,125	18,120	56,859	56,006
Pears—						
Acres in		878	987	1,676	2,525	2,950
Value of crop, in dollars		34,583	41,685	64,125	69,928	70,960
Total number of acres in cultivation in the above-named crops		8,236,592	9,149,067	8,161,921	9,085,466	9,217,936
Total value of the above-named products, in dollars		100,543,479	110,628,878	99,704,554	127,024,205	119,253,858
Total number of tenants in Texas		91,521	87,961	87,369	92,130	95,218
" " farm laborers (paid)		52,999	58,918	57,821	56,491	57,542
" " farmers (heads of families)		220,253	249,153	249,916	253,789	256,844

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UNITED STATES

FOREIGN OFFICE.

1894.

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No. 1438.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE AND FINANCE.

UNITED STATES.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF THE CONSULAR DISTRICT OF CHICAGO.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1233.

Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.

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Reference to previous Report, Annual Series No. 1233.

UNITED STATES.

CHICAGO.

Consul Hayes-Sadler to the Earl of Kimberley.

My Lord, *Chicago, June* 16, 1894.

I HAVE the honour to transmit herewith a Report on the Trade and Commerce of Chicago during the year 1893, together with the Reports of the British Vice-Consuls at St. Louis and Denver for the same period.

I have, &c.
(Signed) J. HAYES-SADLER.

Report on the Trade and Commerce of the Consular District of Chicago for the Year 1893.

ABSTRACT of Contents.

	PAGE
Chicago—	
Introductory	1
Trade of	2
Produce trade	3
Wholesale trade	5
Manufactures	7
Shipping and freights	9
Imports	10
The panic and labour	11
Real estate	14
Chicago drainage canal	16
St. Louis	18
Denver	27

NOTE.—Throughout this report exchange is taken at 4 dol. 85 c. = 1*l*.

Introductory.

The course of the past year at Chicago has been marked by two distinctive features, the World's Columbian Exposition and the financial crisis. These two contending elements, one mainly local the other universal, both in a measure of a transient character, threw business into an abnormal and disturbed condi-

tion, and acted on the trade and commerce of the city in an opposite and counteracting manner. While the former was conducive to extraordinary activity and great benefit to local trade, the latter cast a widespread gloom over the whole country during the last 6 months of the year, and was attended by general depression and decline of business, though this influence was less noticeable and perhaps less real at Chicago than elsewhere from the effect of the bustle and movement resulting from the World's Fair.

An account of the World's Columbian Exposition, including its financial position at the close and a few suggestive remarks on the probable or possible results of the vast undertaking, was given in my report of December 9 last,* and there seems little further of importance to be now added on this subject. The list of awards allotted to each country is at last made known, and the medals and diplomas will, in course of time, be distributed; the foreign exhibits, after numerous difficulties encountered from the regulations imposed and much delay experienced in procuring means of transportation, were eventually removed; the ground has been handed over to the Commissioners of Jackson Park; the buildings are in course of demolition; a return of 10 per cent. on the capital invested has been made, and the affairs of the company are now practically settled. Much benefit has undoubtedly accrued to Chicago, and when the effects of the financial crisis have subsided and business has wholly recovered from the shock, many advantages, hitherto retarded by prevailing scarcity of money, or yet undeveloped, will prove to have resulted to this city and to the country from the energy exercised and the money expended on the great exhibition of 1893.

The undeniable success of the World's Fair, as an exhibition, in a great measure diverted attention from the commercial crisis which ensued not many weeks after the opening, and the general stringency of money was palliated, as far as this city is concerned, by the large amount of extraneous cash circulated by visitors, so that the panic was attended here by perhaps less disastrous results than elsewhere. On the other hand the panic had a detrimental effect on the financial success of the exhibition; money which would have been spent there was in many cases needed at home, and many people hesitated before undertaking the expense of a visit. Throughout the country disastrous results and commercial difficulties prevailed; production was diminished; many industrial establishments suspended or reduced operations, and numbers of workmen were thrown out of employment, entailing an amount of distress among the labouring classes which had been hitherto unknown in these parts.

The Trade of Chicago.

The trade of Chicago in 1893 shows a falling-off compared with that of the preceding year, owing to universal dulness con-

* Miscellaneous Series No. 314.

sequent on the financial crisis, but the decrease was not large, and in making the comparison the fact must be taken into consideration that almost every year had shown large and successive increase, and that the year 1892 was an especially prosperous one. The year opened with great activity, and promised at least an average percentage of increase in volume of business till the panic caused general depression in transactions. The record, based as on previous occasions on a summary compiled by the best authorities, and on such official returns as are available, shows a decrease of about 6·75 per cent., as compared with the record of 1892, the total trade being estimated in round figures at 295,800,000*l.*, or 21,300,000*l.* less than in 1892, when the estimate amounted to 317,100,000*l.* In this calculation speculative transactions and those in stocks or real estate are not included, and in this total value a certain reduction has been made as in former years to allow, in dividing the trade into three departments, for any overlapping there may be, especially in the wholesale and manufacturing trades. In taking these departments separately the approximate value of the produce trade has been estimated at 97,500,000*l.*, that of the wholesale trade at 107,100,000*l.*, and of the manufacturing trade at 117,300,000*l.*

Produce Trade.

The receipts and shipments of the principal articles of produce, according to statements of the Board of Trade and other sources, will be seen in the following return, compared with those of 1892:— Receipts and shipments.

Articles.		1893.		1892.	
		Received.	Shipped.	Received.	Shipped.
Flour	Barrels	4,684,424	4,105,117	5,919,343	5,710,629
Wheat	Bushels	35,255,101	24,715,738	50,234,555	43,833,795
Corn	,,	91,255,154	78,919,781	78,510,385	65,104,220
Oats	,,	84,289,886	67,129,119	78,827,985	67,332,322
Rye	,,	1,707,072	1,320,013	3,633,308	2,775,600
Barley	,,	13,375,845	8,233,268	16,989,278	10,438,281
Grass seeds	Lbs.	52,440,522	72,138,909	53,228,779	60,670,835
Flax ,,	Bushels	8,101,992	7,730,641	9,473,824	8,802,220
Cured meats	Lbs.	119,599,941	548,451,386	179,965,327	743,859,554
Canned ,,	Cases	44,666	1,240,900	92,998	1,428,331
Dressed beef	Lbs.	178,782,265	1,257,581,873	149,496,436	1,212,344,343
Pork	Barrels	6,527	210,092	16,934	294,781
Lard	Lbs.	47,741,901	367,894,172	68,371,502	398,915,558
Cheese	,,	59,303,480	51,101,900	64,396,960	48,504,956
Butter	,,	150,742,420	145,796,180	154,128,700	139,118,655
Live hogs	Number	6,057,278	2,149,410	7,714,435	2,926,945
Cattle	,,	3,133,406	960,183	3,511,796	1,121,675
Sheep	,,	3,031,174	442,865	2,145,079	433,368
Calves	,,	210,557	13,832	197,576	31,004
Horses	,,	82,492	70,011	86,998	74,368
Hides	Lbs.	88,002,681	206,813,490	110,082,233	229,711,358
Wood	,,	28,451,708	36,502,734	28,388,364	44,396,698
Lumber	Mct. feet	1,600,677	719,254	2,203,874	1,060,117
Potatoes	Bushels	4,565,573	959,446	5,563,950	897,590
Eggs	Cases	1,728,906	951,600	2,153,030	1,653,118

The receipts and shipments of flour were about one-third less than in 1892; the receipts of wheat fell off by nearly 15,000,000 Flour and wheat.

bushels, and the shipments by 19,000,000 bushels. Money stringency told on a low market and wheat suffered in common with other products, prices ruling lower than at any former period. The harvest produced considerably less than in the preceding year, which again showed a large falling-off from the yield of 1891, so that, with the low price of cereals, farmers realised little profit, and dulness pervaded the operations of dealers. Although the demand in European markets was fair, the competition of Russia at low prices prevented any tendency to a rise here. The cash price of No. 2 wheat averaged only 2*s.* 9½*d.* a bushel, against 3*s.* 3½*d.* in 1892 and 3*s.* 11½*d.* in 1891, and at one time in July the price was as low as 2*s.* 3*d.* a bushel.

Corn. The corn market was also dull and prices of No. 2 corn fell almost gradually from 1*s.* 9*d.* in January to 1*s.* 5½*d.* in December, the average price for the year being 1*s.* 7½*d.*, against 1*s.* 10*d.* in 1892 and 2*s.* 5*d.* in 1891. Notwithstanding this depression, movement was active, and nearly 13,000,000 bushels were both received and shipped more than in the preceding year. Though influenced by the general low price of cereals, the oat market was steady and firm as compared with those of wheat and corn, and the receipts and shipments exceeded those of 1892. The average price per bushel was 1*s.* 2*d.*, compared with 1*s.* 3½*d.* in the preceding year.

Oats.

Rye. The average price of rye fell from 2*s.* 9½*d.* in 1892 to about 1*s.* 10*d.* last year, and the market was dull, export business to Europe having been restricted from the abundant supply furnished from Russia.

Barley. A less quantity of barley was also received, and the demand for breweries, which on account of the World's Fair was expected to be large, failed to realise expectations.

The total receipts of cereals in 1893 was valued at 21,675,000*l.*, against 26,021,000*l.* in 1892.

Seeds. The market for seeds proved more satisfactory, and a sudden rise in flax seed in December contributed to raise the average price to a higher point than was reached in 1892, though receipts were about 14 per cent. less in quantity than in that year. The business in grass seeds was fairly active.

Live stock. In reviewing the live-stock market it must be remembered that the receipts of cattle in 1892 were the largest ever recorded at Chicago, owing greatly to drought and forced sales of poorly-fed animals, especially from Texas, and that the decrease of 440,000 head in the number received still leaves the arrivals at double the figure reached 10 years ago. With regard to hogs, the receipts were 1,671,157 head less than in the preceding year, and 400,000 less than the average for many years, and amounted to 6,057,278, while the price fetched was far more satisfactory to farmers than to the packing interests, being 3*s.* 4*d.* above the average per head for the last 17 years. Shipments consequently fell off. The same condition ruled in all the establishments west, where the supply of hogs was short and prices high. It was mentioned in the report of last year that considerable attention

has lately been paid to the raising of sheep in some of the western and north-western States. A large supply was, therefore, last year thrown on the local market for which there was no profit in shipment, as it appears an unusual number of sheep had also been lately raised in the eastern States. Prices realised were more than 20 per cent. below the average, and have rarely, if ever, been so low. The supply of horses exceeded the demand, and prices were low, especially during the latter part of the year, when the financial crisis had a depreciating influence. Hay was in great demand for the World's Fair, and for export, prices ruling at 1*l.* 17*s.* per ton.

Value of live stock.

The whole of the stock handled at the Union stockyards in 1893, though somewhat less than in the preceding year, was valued at more than 50,000,000*l.*

Sanitary condition.

With the exception of a sudden outbreak of malignant anthrax in a part of the State of Illinois, which was in a short time stamped out by cremating diseased cattle, the sanitary condition of animals in this district was good throughout the year.

Dairy products.

Receipts of butter and cheese were slightly smaller than in 1892. Decrease in volume of production from prevalent drought, added to larger demand on account of increased population and the World's Fair, though in a measure counteracted by hard times, caused prices of dairy products to be fairly maintained. The average price of cheese was 5*d.*, and best butter fetched about 1*s.* The total value of receipts under the head of produce is estimated at 97,580,000*l.*, against 104,540,000*l.* in 1892.

Wholesale Trade.

The great prosperity which marked the wholesale trade of Chicago in 1892 lasted during the early months of the following year, until the financial crisis, so often referred to in this report, caused dulness in all branches of industry, and resulted in the considerable falling-off of 9½ per cent. in value of business done compared with the preceding year. The continued demand for many goods consequent on the exhibition in some measure prevented wider stagnation, but country trade was dull, stocks were not replenished in the same degree as usual, and all articles as a rule were cheaper, many of them having never been so low in price as during the last winter. In dry goods the decrease in value of business done is estimated at from 10 per cent. to 15 per cent. Carpets so much in request for purposes connected with the World's Fair fell off in demand during the latter half of the year. There was a decline of 25 per cent. in the value of the clothing trade, and of 10 per cent. in the boot and shoe trade. In the grocery business there was a fair increase, but hardly so large as was expected from the number of visitors attracted to the city, and a large increase in the home-dried fruit trade, though prices were reduced. Curiously enough the demand for coffee was unusually great from its taking a larger proportion in

the diet of the labouring classes on account of the prevailing distress. The tobacco and cigar trade also shows some advance owing to the number of visitors. The wholesale furniture trade, especially in the cheaper descriptions, was active, though country demand was small. In the hardware and cutlery business there was comparative dulness, and the crockery and glassware trade fell off greatly during the latter half of the year. It is natural that a sensible decrease should be shown in the lumber trade after the greatly-increased consumption in 1892 for the buildings of the Exhibition, and of those connected with it, and the receipts fell from 2,200,000,000 feet to 1,600,000,000 feet. For the same reason all industries associated with the building trade were comparatively depressed. The iron industry declined, business in structural iron falling off about 50 per cent., some of the largest manufacturing works were temporarily suspended, and the coke iron blast furnaces were all closed in the autumn.

The total wholesale business declined about 9½ per cent. from the estimate given for the preceding year, though it fully equalled the result attained in 1891.

A comparison of the wholesale trade of Chicago for 5 years will be seen in the following return:—

Articles.	Value.				
	1889.	1890.	1891.	1892.	1893
	£	£	£	£	£
Dry goods and carpets	[illegible]	[illegible]	[illegible]	21,576,000	[illegible]
Groceries	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Lumber	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Manufactured iron ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Clothing	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Boots and shoes ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Drugs and chemicals ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Crockery and glassware	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Hats and caps ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Tobaccos ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Tinned and salted fish and oysters	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Oils	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Dried fruits	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Building materials ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Furs	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Carriages ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Pianos and musical instruments	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Music books and sheet	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Boots, stationery, and wall paper	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Pig iron	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Coal	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Ironmongery, cutlery ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Woodenware, wirework ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Liquors	2,071,000	2,815,000	3,000,000	3,462,000	3,[illegible]
Jewellery, watches, and diamonds ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Leather, ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Iron and copper ...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Paper	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Miscellaneous	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Total	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Manufactures.

The manufacturing trade likewise suffered from general depression caused by the financial panic, and it is estimated that there was a decrease in the entire value of production to the extent of nearly 4¼ per cent. compared with that of the preceding year, notwithstanding the considerable increase in the brass and copper, printing, brewery, and tobacco industries arising from the greater demand caused by the Exhibition. The total value of the product of 1893 is estimated at 117,275,000*l.*, the falling-off being mainly due to a decrease in the packing business, in the wood, brick, and stone, and textile fabric industries, and in the production of iron and steel. The capital employed in manufactories continues to be on the increase, but the value of product does not seem to keep pace with the increase in money invested, which has doubled in the last 5 years. The total capital employed in manufacturing business in 1893 is stated to have been 50,367,000*l.*, against 47,262,000*l.* in 1892, while the value of production decreased by 5,000,000*l.* The number of firms declined from 3,433 to 3,405, while the number of men employed was also smaller, and the total wages paid declined from 23,581,000*l.* to 20,454,000*l.*

Value of manufactures.

Capital employed.

In the packing business the total meat production was valued at 22,062,000*l.*, compared with 24,478,000*l.* in 1892, and 28,304,000*l.* in 1891. The hog product was valued at 10,300,000*l.*, the beef packing at 8,025,000*l.*, lard, lard-oil, and stearine at 2,254,000*l.*, and butterine at about 866,000*l.* Dressed beef shipments have doubled in the last 10 years, amounting last year to 530,000 tons, while 1,250,000 cases of canned meat were shipped, being double the quantity shipped in 1883. Prices of hog product were unusually high both here and at the packing houses in the west (and consumption was in some degree affected thereby) till about 2 months before the close of the year, when a heavy fall occurred. Export trade, though considered fairly satisfactory, was somewhat restricted, and only about three-fifths of the quantity of lard and pork was sent to Europe as was shipped in 1892. Mess pork, which fetched an average price of 2*l.* 6*s.* 1*d.* in 1891, and 2*l.* 6*s.* 7*d.* in 1892, rose to an average of 3*l.* 10*s.* in 1893. The average price of lard was 1*l.* 5*s.* 9*d.* per 100 lbs. in 1891, 1*l.* 10*s.* 4*d.* in 1892, and 2*l.* 0*s.* 11*d.* in 1893, a similar rise in value ruling in all meat products. Nearly 300,000*l.* less was paid in wages in the packing business at Chicago than in the preceding year.

Packing trade.

In other branches of manufacturing industry the effect of the panic and money stringency is clearly discernible, though the stimulus given by the World's Fair in a great measure prevented more disastrous results. The iron and steel industry, the most important branch of manufacture next to the packing business, fell off nearly 2,000,000*l.* in value of production, which was estimated at 12,950,000*l.* There was little demand for rails, which went as low as 4*l.* 10*s.* 9*d.* per ton, no new lines of railway

Iron and steel.

having been built, and scarcely any extensions made, while several principal lines having been forced into the hands of receivers, few repairs were done. The number of rolling-mills was reduced from 6 to 5, and of foundries from 62 to 53. The output from the mills, which in 1892 was valued at slightly over 5,000,000*l.*, fell to 2,887,000*l.*, but an increase of about 680,000*l.* brought the output of the foundries to an estimated value of 2,990,000*l.* The large works of the Illinois Steel Company shut down early in the autumn, and the branch works at Joliet were closed nearly the whole of the year. The product of the 82 machinery and malleable iron establishments was estimated at a value of 2,350,000*l.*, or about 350,000*l.* more than in 1892. There was a decrease of nearly 10,000 men in the total number of hands employed in the different iron and steel industries, and a reduction of about one-third in the aggregate amount of wages paid, which scarcely reached 2,700,000*l.* Owing to the shorter demand for ore, mining has been less active, especially in the older districts, where cost of extraction is greater than at some of the lately discovered mines.

Brass and copper.

The brass and copper industries developed an increased output of 2,637,000*l.* in value, the production in 1893 being estimated at 13,433,000*l.*, owing to the unusually large employment of material at the World's Fair and for the numerous hotels, restaurants, and other buildings constructed to meet the requirements of expected visitors, as well as to the greatly increased output from smelting and refining works, which alone was valued at about 8,500,000*l.*

The tin, stamped and sheet metal-ware industries turned out to the approximate value of 1,413,000*l.*, or slightly less than in either of the two preceding years. The total number of workers employed in the brass and copper industries was larger by 7,000 than in 1892, amounting to 16,300 hands, and the aggregate amount of wages paid was about two-thirds greater.

Iron and wood.

The whole manufacturing trade in iron and wood, including car and bridge building, elevators, and sewing machines, is stated to have amounted to 9,258,000*l.*, against 8,950,000*l.* in 1892 and 8,495,000*l.* in 1891. Notwithstanding a general decrease in demand in the latter half of the year, the manufacture of carriages and wagons was well maintained, and a further advance in product made, as well as in that of agricultural implements, the output of the latter being valued at 4,200,000*l.*

Wood.

In manufactures of wood a great falling-off occurred, especially in furniture, after the demand for hotels and other buildings fitted up expressly to accommodate strangers has been supplied. The manufacture of furniture, which was valued at about 4,000,000*l.* in 1892, declined by more than 1,000,000*l.*; and slackness pervaded the planing mills, and the sash, door, and staircase industries, the product being less by 825,000*l.* in value than in the preceding year, when it was estimated at 2,371,000*l.* The total manufacture of wood was valued at 8,381,000*l.*, against 10,684,000*l.* in 1892.

Brick and stone.

As soon as the great works of the Exhibition and the buildings to meet its demands were completed, comparative stagnation ensued in the brick and stone industries, as well as a fall in prices. The average price of bricks per 1,000 fell from 1*l.* 9*s.* to 16*s.* 6*d.*, and the quantity turned out at the yards from 725,000,000 to 600,000,000. All other branches of the trade suffered, and the total value of the product of the brick and stone industries, which in 1892 was 3,267,000*l.*, declined to 2,422,000*l.*

Other industries.

There was an advance of about 5½ per cent. in the produce of the breweries on account of the number of visitors to the city, and the printing trade showed a large advance from the unusually large sale of papers and printed matter connected with the Exhibition. On the other hand, there was a considerable falling-off in the trade in textiles, though this trade promised well at the commencement of the year. Men's clothing and millinery business was particularly affected by tightness of money, and prices were depressed during the latter part of the year. Stocks were kept low, a fact, however, which promises more active times for manufacturing interests this year.

Shipping and Freights.

Shipping.

The following is a return of shipping entered and cleared in the customs district of Chicago, which includes the two small ports of South Chicago and Michigan City:—

Nationality.	Entered.		Cleared.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Coasting trade ...	8,641	5,399,309	8,406	5,200,766	17,047	10,600,075
Foreign trade—						
Canadian ...	37	26,659	39	28,314	76	54,973
American ...	76	30,669	344	220,390	420	251,059
Total, 1893 ...	8,754	5,456,637	8,789	5,449,470	17,543	10,906,107
,, 1892 ...	10,556	5,966,626	10,567	5,968,337	21,128	11,934,963
,, 1891 ...	10,224	5,524,832	10,394	5,506,700	20,618	11,021,552
,, 1890 ...	10,507	5,136,253	10,547	5,150,615	21,054	10,286,868
,, 1889 ...	9,802	4,521,886	10,023	4,629,184	19,825	9,151,070

Freights.

The results of the year were disappointing to the carrying trade on the lakes. Freights were low, and the hopes entertained of a good season to result from railroads being occupied with World's Fair traffic were not realised. Every year shows a slight increase in the size of vessels, and the large steamers were the only ones last year which are said to have made any profit, while the smaller sailing vessels were trading at a loss. If it is reasonable to judge from last year and the manner in which cargoes were competed for, it seems that carrying facilities on the lakes are in excess of demand as far as a profitable return can be realised. The average freight on corn from Chicago to Buffalo

during the season, which lasted 6½ months, was 1·43 c., or scarcely ¾*d.*, per bushel, and on wheat 2·11 c., or rather more than 1*d.*, while 1*s.* 11*d.* per ton was the average freight for coal from Buffalo to Chicago.

Railroads freights suffered from the competition of the lake vessels, and were low throughout. There was a fall of from 30 per cent. to 40 per cent. on the freights of 1892, which, however, were higher than usual from the movement caused by the abundant harvest of 1891. The charge on provisions from Chicago to New York averaged 10*d.* per 100 lbs., and on grain 7½*d.* per 100 lbs.

Imports.

The return given below shows the nature and value of the principal articles of merchandise imported direct to Chicago, according to a list furnished by the customs authorities, but it represents only a portion of the goods imported for consumption, as the majority pay duty at the seaboard and do not enter into the customs returns here. Covering a period of five years, it will demonstrate in a measure the effect of the tariff changes of 1890, though much of the increase in imports last year must be laid to exhibits remaining in the country from the World's Fair.

It will be seen that manufactured tobacco and cigars are not imported to half the extent they were before the McKinley Act, local manufacture having greatly supplanted the imported article. The decrease last year was 16,000*l.*, and the total value, 46,000*l.*, is actually only one-third of the value of the imports of 1890, while, on the other hand, the import of leaf tobacco shows a large increase. The imports of caustic soda and dried fruits both decreased by more than 50 per cent. Musical instruments show a decline, local manufacture having made great strides. A considerable increase is shown in many articles, notwithstanding general low prices. Leather manufactures, painting and statuary, china and glassware, and metal manufactures, had their total value augmented by the sale of exhibits, and the imports of jewellery, stone and marble, and printed books, were also large.

TABLE showing Value of Articles Imported during the Years 1889–93.

Articles.	Value.				
	1889.	1890.	1891.	1892.	1893.
	£	£	£	£	£
Free goods	496,257	702,121	672,462	827,816	798,002
Ale, beer, porter	8,312	10,377	9,747	12,889	14,799
Art materials	13,369	15,284	9,650	12,119	6,542
Books, printed	9,220	10,624	8,192	7,867	10,466
Brushes	4,322	5,600	7,187	6,465	6,716
Chemicals	6,681	3,871	5,772	2,200	1,259
China, glassware	106,836	115,710	171,765	173,445	203,351
Caustic soda	13,280	18,888	11,998	13,769	5,730
Cigars, tobacco, manufactured	102,309	136,744	61,842	62,695	46,015
Cutlery	6,181	4,967	4,880	6,808	9,875
Diamonds, precious stones	66,103	74,486	25,853	51,906	40,687
Dressed furs	26,621	32,240	49,405	24,355	41,497
Dried fruits, nuts	70,003	113,050	66,050	67,700	30,513
Drug sundries	9,625	9,006	8,836	15,323	16,036
Dry goods	933,980	991,231	832,262	1,101,031	1,120,787
Fish, all kinds	40,117	31,371	48,501	54,919	37,711
Guns	9,506	8,940	4,414	1,261	1,516
Iron manufactures, wire	22,656	37,961	78,605	127,796	86,810
Jewellery	3,915	3,160	11,361	2,293	38,953
Leaf tobacco	41,273	34,326	42,298	79,739	124,104
Leather manufactures	61,285	52,115	50,320	59,442	35,749
Looking-glass plates	2,000	3,455	11,950	18,172	14,120
Metal manufactures	32,422	45,222	57,530	71,483	110,792
Millinery goods	17,346	18,284	18,801	23,166	15,615
Musical instruments	39,704	43,216	43,890	41,739	30,579
Needles	2,445	2,328	272	275	544
Paintings, statuary	12,066	15,069	11,619	18,168	44,933
Paper manufactures	4,266	4,504	12,589	17,377	22,551
Paper hangings	924	459	1,082	2,311	728
Pickles and sauces	3,250	2,968	5,264	6,785	3,227
Plate window glass	16,534	12,214	8,509	7,380	4,746
Smoker's articles	1,818	2,616	5,559	4,308	9,228
Stone, marble	2,458	7,681	8,618	12,251	21,506
Tin-plates	296,925	336,599	328,094	270,042	240,092
Toys, fancy articles	25,532	24,796	15,802	31,785	33,637
Varnish	757	866	1,055	712	343
Wines, liquors	67,381	76,178	88,567	106,057	109,253
Wood manufactures	13,203	12,104	38,956	35,561	42,119
Total, including a few other articles	2,785,018	3,174,617	3,116,653	3,585,257	3,849,950
Duties	1,040,934	1,069,582	1,233,730	1,544,035	1,711,180

The Panic and Labour.

The panic, so often referred to in this report, which cast so depressing an influence over trade in this district during the latter half of the year, may be greatly attributed to depreciation in the value of silver, to over-production, and perhaps in some degree to tariff uncertainty. It was not a local panic, but part of a storm wave which travelled rapidly from east to west, and swept over the whole of the United States. Even if its origin cannot be traced so far back as the Baring failure, that first cloud in the horizon, when so much stock was thrown on the market here, it was probably accelerated by the great Australian bank failures, which caused a certain feeling of insecurity among communities here, judging from those disasters, as to the stability of their own banks. Unlimited confidence in the currency of the country acted in accentuation of the panic, for on the first alarm of the storm a rush was made in June to withdraw de- The panic.

posits from banks and place money in deposit vaults, banks being thus left in the position to render interchange difficult. In this city the banks, which are strong and carefully handled, were less affected by the panic than those in many other cities, on account of the large amount of currency payments in connection with the exhibition; they continued to pay in cash, and did not have recourse to the issue of clearing certificates, which were resorted to at New York and some other places for 75 per cent. of value. For a few days the pressure was great, one bank keeping open the greater part of the night in order to satisfy the long line of depositors awaiting their turn for payment, but the only banks which closed their doors at Chicago were the Chemical National Bank, the Colombian National Bank, Hermann Schaffner and Co., and S. Silverman. In other parts of this district matters were more serious; at Denver there were twelve bank failures, at Kansas city six, while at Helena, Milwaukee, and indeed all the western cities, the number of failures was great. Altogether in the central and western States no less than 367 National and State banks suspended payment, with aggregate assets of about 20,000,000*l.* sterling, and liabilities of 16,000,000*l.* sterling; about half of these resumed operations before the close of the year. The bank clearings fell rapidly on the crisis, at some cities showing a reduction for several weeks of 50 per cent. and occasionally 80 per cent. compared with those of a similar period in the preceding year. Owing however to the favourable condition of the World's Fair, the total restriction in the clearings at Chicago scarcely reached 10 per cent. for the year compared with those of 1892. in which latter year they showed an increase of 13 per cent. over those of 1891. The bank clearings at Chicago fell from 1,058,921,900*l.* in 1892 to 964,321,643*l.*, though for the first 6 months they were considerably in excess of the clearings in the first 6 months of the preceding year. Omaha and Duluth were almost the only exceptions in this district where the clearings for the whole year exceeded those of 1892. At other cities the decrease in the year varied up to 30 per cent., owing to the heavy losses during the last 6 months, and recovery from the effect of the financial crisis is still slow.

Another striking incident was the large proportion of railroad mileage which passed into the hands of receivers, several of the principal great lines operating through this district, including the Union Pacific, the Northern Pacific, and the Aitchison, Topeka and Santa Fé lines being in difficulties. Several reasons besides the financial crisis are given for this condition, and opinions vary, but it seems very generally laid to over-capitalization, or to the greater cost of operating and a steady increase in the scale of wages while rates of transportation have weakened. It seems certain that while traffic and capital have increased largely, revenue per ton and per passenger per mile and earnings available for dividends have decreased in the last 10 years.

Though it was a year of financial disasters not before equalled in these parts, merchants, as a rule, stood the crisis well, and

failures were fewer than might have been expected from the large number of bank suspensions. Manufacturing and mining interests were, however, greatly affected, and depression ruled in almost all branches of business. In Montana and Colorado mining operations were almost entirely suspended, and throughout this district many mills and manufacturing establishments were closed or temporarily run on a reduced scale, while prices fell from lack of demand. Fewer failures occurred at Chicago than at most other cities comparatively speaking, but business was greatly checked, and resources in many instances severely tried. Failures in the provision trade were more numerous than usual here, and were accompanied by heavy losses, while much delay and difficulty occurred in realising assets from tightness in the money markets. Banks could not afford to part with money for fear of a run during the panic, and for some time it was impossible for even men with large capital to lay their hands on cash. Exchange fell to an unusually low point during the summer months, and securities were greatly depreciated in value, a condition from which there was considerable recovery towards the close of the year.

Labour.

As a natural consequence of this general depression the labour market has been in a very distressful condition. A very large number of workmen were thrown out of employment, and were unable to obtain means of subsistence; no provision existing in this part of the United States to meet such a state of affairs, many wandered about the country in the hopeless search for work or food. In this city a multitude of people, who came on speculation or for the purpose of starting some enterprise with a view of profiting by the crowds who visited the exhibition, were left stranded when the World's Fair was over, thus adding to the prevailing distress which had never been so pronounced since the great fire of 1871. Ever since the exhibition was proposed, numbers of working men from different countries, far in excess of the demand, had been attracted by the flourishing condition of Chicago, and by reports of the high rate of wages, forgetting that the cost of living was also far higher than at home, or not troubling to enquire or inform themselves on that point. Many of these soon found themselves in a pitiable position with nothing to fall back upon and starvation staring them in the face.

As long as the Exposition lasted, the surplus of labour was not so noticeable, many having been able to get some sort of temporary work, but when others were thrown out of work by the shutting down of mills and other establishments or their temporary suspension from the panic, and when work at the exhibition was completed, employment of any kind was practically impossible to obtain. No adequate means were available here to meet a parallel condition; the resources of charitable institutions were soon exhausted; as winter came on hospitals and poor-houses were crowded, and thousands found themselves without shelter or food and dependent on charity. The Jews set the example in the distribution of food to alleviate the suffering; much assistance

was given by private charity and by collections from employés, relief associations were established, and food given as wages for work in cleaning the streets, but much distress remained and exists even at the present time. Warning was given in previous reports of this almost certain reaction after the close of the World's Fair, but the accentuation caused by the commercial depression could not have been anticipated. Wages, which had for some time been unusually high from the great demand for skilled labour especially in the building trades, were for a time cut down to a former scale, and workmen often gladly consented to reductions, but at the commencement of the present year, and now when business shows signs of improvement and industries are recovering, a wave of discontent seems to pervade the labour market, disturbing its general condition and restricting confidence in the employment of capital. Strikes are of constant occurrence; trades unions are endeavouring to maintain the former high rate of pay by combined enforcement, and any attempt by masters to employ non-union men at wages they would willingly accept is arbitrarily and forcibly opposed. Wages may be thus kept up, but less money is made by the workmen than formerly for the reasons of enforced idleness and shorter hours. The foreign immigrant, unless from a country where the rate of remuneration is extremely low, should entertain no certainty of improving his condition, experience indeed often leading to an opposite conclusion; unless a man belongs to a trades union there is no certainty of his obtaining permanent or remunerative employment, and even then he is at the mercy of the delegate. Though wages may continue to appear high in these parts, the view expressed 2 years ago in a special report on labour is confirmed that the chance of a labouring man to gain much more than sufficient to make both ends meet is small.

Real Estate.

It might well be imagined that, when the high value of real estate in this city and the great rise which has taken place within the last few years are taken into consideration, city property would have experienced a fall after the stimulus given by the exhibition had subsided. The financial crisis in the summer might well have been expected to have exercised a depreciative influence at a place where building has been carried on to such an extent as it has at Chicago.

The market has certainly shown comparative dulness after the great activity of the last 2 or 3 years, and instances of weak sales have occurred, but no general fall in value has taken place, and, as a rule, property is well held for even a further rise. Some reaction has, no doubt, followed from the fabulous prices realised in view of the World's Fair on property adjoining Jackson Park, but the increased transportation facilities which were secured by the Exposition to this part of the city prevent any great fall in

value; some of the hotels expressly constructed in the vicinity to accommodate visitors proved a failure, some are re-arranged as apartment houses at a moderate rental, and profits expected were not generally realised, but even in this new city, which sprung up round the exhibition grounds in so miraculously short a time, the value of property is fairly maintained, and no such great depreciation has taken place as might have been expected under the circumstances. In the business centre of the city no retrograde movement has occurred, fresh purchases made demonstrating a still increased value of property and being void of a speculative character. A considerable number of tall buildings for office purposes were completed during the year, and others are in course of construction; on account of the great number of such buildings erected in the last few years a reduction of 10 per cent. to 20 per cent. in rental is not uncommon on fresh leases. Long term leases for business property in the heart of the city are frequent, and sometimes with increasing rent at fixed periods. In one instance last year in a first class situation, a long term lease was made with increasing rental, which places a capitalised valuation on the property of 26*l.* 4*s.* per square foot in 1896; 29*l.* 14*s.* in 1901; and 34*l.* 18*s.* 2*d.* in 1906. On another property, 80 feet by 90 feet, leased at 3,200*l.* a year for 5 years, 3,600*l.* for the following 5 years, and 4,000*l.* for the remainder of a 99 years' lease, a value on the capitalised rental on a 5 per cent. basis has been established of 160,000*l.*, or about 23*l.* a square foot. Another property was leased giving a valuation on the capitalised rental of 18*l.* per square foot, and several similar leases giving a somewhat lower value to the property were made during the year. Outside the centre of the city and in the environs property is well held, prices showing no disposition to fall, and in most cases a higher value is established. House rents generally have gone down to what they were before the period of the exhibition. Sales of city property have not been so numerous as in either of the three preceding years, the total value amounting to 22,000,000*l.*, while in 1890, when the great rise caused by the exhibition commenced, they reached the sum of 35,000,000*l.* In round figures, permits for building operations in the city were granted to the value at contract price of 4,200,000*l.* in 1888; 5,150,000*l.* in 1889; 9,750,000*l.* in 1890; 11,414,000*l.* in 1891; 13,500,000*l.* in 1892, and 6,400,000*l.* in 1893. Fire-proof constructions for business purposes are now limited in height to ten stories or 130 feet.

The law enforcing examination by the State auditor into the financial condition of loan and building associations is now in force, as well as a law fixing a deposit to be made on all foreign national associations which practically seems to bar them from conducting business in this State. In the State of Illinois there are some 600 of these associations, which have aggregate deposits of about 6,000,000*l.*, and have loaned over 13,000,000*l.* to stockholders

Chicago Drainage Canal.

The great excavation works of the new drainage canal in course of construction by the sanitary district of Chicago between that city and the Desplaines River near Joliet are now in full operation as far as Lockport in the Desplaines valley. For some years the condition of the Chicago River, which in its course through the centre of the city receives the whole of its sewage, has been a grave question. The population has yearly increased, it has, in fact, doubled in the last 8 years, Chicago now numbering about 1,500,000 inhabitants, and the river has annually become an increasing source of danger, especially as the water supply of the city is more or less contaminated by the river flow into the lake. The water supply has been derived entirely from Lake Michigan by means of a tunnel running under the lake to a distance of 2 miles, till last year a new tunnel was completed to a distance of 4 miles, from which the supply is now greatly taken, while pumping power has been resorted to in the endeavour to control the current of the river and carry the sewage into the Desplaines valley. The pumping works, however, at Bridgeport on the south branch of the Chicago River have been unequal, particularly during spring floods, to the task of maintaining the flow up stream from the lake; a certain portion of sewage, therefore, passes into the lake, and while it is doubtful if even the supply derived from the 4 mile crib is free from contamination, the water supplied to Chicago is not considered safe to drink unless filtered and boiled. To this condition of the drinking water, together with exhalations from the river and the uncleanly state in which the alleys of the city are kept, is greatly ascribed the prevalence of typhoid fever for the last few years, as well as the outbreak of small-pox, which has taken almost an epidemic form in the last 4 months, and though modifying has not yet disappeared.

In 1889 a drainage law was passed providing for the formation of sanitary districts in this State, with power within certain limits of levying taxes distinct from Municipal Government. Under this law the sanitary district of Chicago was formed, and is now constructing the drainage canal to the Desplaines River below Joliet; so as to carry in dilution the sewage of Chicago thence down the River Illinois to the Mississippi; it is claimed that thus a flow of fresh water up from the lake, at the rate, if necessary, of 600,000 feet per minute, will be ensured, and that the water supply of the city will be thus free from any chance of sewage contamination.

The course of the drainage canal runs nearly due south-west from its starting point at Robey Street on the south fork of the Chicago River inside the city limits, and at about 9 miles from Chicago enters the Desplaines valley, following the course of that valley for the remainder of its whole length of about 40 miles, till at some point a short distance below Joliet the canal will join the Desplaines River. To control the wide fluctuations of this stream, it was found necessary before excavating the canal

to construct the river diversion channel at a cost of nearly 200,000*l.* About 13 miles of new river channel had to be excavated and about 19 miles of levee built to separate the waters of the Desplaines watershed from the drainage canal; it was also necessary at the head of this diversion to construct a concrete and cut stone dam, or spillway, 367 feet long and 16 feet above the water level of Lake Michigan to allow surplus water to flow towards Chicago, arrangements not having been yet perfected for carrying the whole flood waters of the Desplaines River through Joliet. The cross section of a part of the earth sections of the drainage canal will be 202 feet at the bottom, and of the other part 110 feet, but this narrow section, which provides for a flow of 300,000 cubic feet per minute, sufficient for the present population of the city, can be enlarged by dredging to meet requirements. The cross section of the rock cuttings, and 20 miles of the course of the canal is through rock or hard material, will be 160 feet at the bottom with vertical sides of masonry 5 feet above water line, and designed for a flow of 600,000 cubic feet a minute, sufficient to provide for a population of 3,000,000 people.

The work of excavation was put in hand by placing a few sections under contract in September, 1892; further sections were placed under contract last year, and bids for others having been opened in April last, the whole of the excavation work from Chicago to Lockport, in Will County, 4½ miles above Joliet, are now in operation under contracts to be completed in November, 1896. The cost of the works under contract is about 3,300,000*l.*, and, including cost of construction beyond Lockport, bridges, locks, and right of way not yet acquired, the whole cost of the drainage canal is estimated at about 4,500,000*l.* The depth of water throughout the canal is to be 22 feet. Below Lockport there is a fall of about 42 feet to Joliet in the distance of about 4⅓ miles, to meet which fall and the fluctuations of Lake Michigan, controlling works will be necessary, the plans for which are not yet adopted; the further excavation necessary beyond Lockport to the point below Joliet where the canal is to join the Desplaines River are not yet put in hand.

When completed the drainage canal, constructed by the sanitary district of Chicago, will be a free waterway navigable for vessels drawing less than 22 feet as far as Joliet; and should measures be taken to deepen the channel of the Desplaines River beyond the point where the canal will join that river, and to improve the navigation of the Illinois River, works which it is here hoped may be some day undertaken by the Government, the largest ships, which will be able to navigate the Mississippi under recent plans for the improvement of that river, will be able to pass from New Orleans to Chicago. In a commercial point of view the completion of such navigable communication between the Gulf of Mexico and the great lake system between the United States and Canada, should it be wholly carried out, would be most important.

St. Louis.

Mr. Vice-Consul W. Bascome reports as follows:—

Financial depression.

The year 1893 was one of great depression in nearly all classes of business, very few departments showed any increase.

This depression was general in all parts of the United States, and from comparison with the clearing house returns of other cities of importance St. Louis seems to have passed through the period of financial depression better than any of its competitors.

The year opened with great distrust of the finances of the country, attributed generally to the very large outflow of gold and the effect of the purchase of 4,500,000 ounces of silver monthly, as required by the Sherman Law, creating in the minds of the public apprehension as to the ability of the Government to meet all its obligations in gold under this great drain of gold and increase in silver certificates.

Withdrawal of deposits.

Millions were withdrawn from the banks and financial institutions and placed in safe deposit vaults, and other loanable capital which would otherwise have been available for works of improvement, manufactures, commerce and building were withheld and the onward march of commerce was checked during about 5 months of the summer and fall.

It is estimated that banks and trust companies paid out 4,600,000*l.* during that time. Of this sum it is estimated that 1,600,000*l.* went to liquidate debts, and 3,000,000*l.* was temporarily withdrawn from circulation and hoarded for safe keeping.

No bank failures.

While the papers gave daily reports of suspended banks and large establishments of high reputation were giving way under the strain, not a single bank failed in this city during the year, when there were 642 bank failures in other parts of the United States. No other city of the first, second, or third class was so fortunate as St. Louis.

Per cent. of deposits withdrawn.

Although the withdrawals during 90 days equalled 28½ per cent. of the total deposits of the banks, it was not found necessary to issue clearing house certificates, as obtained in New York and other large cities, the banks holding more than 40 per cent. of cash assets against cash liabilities.

Return of deposits.

When the purchasing clause of the Silver Bill was repealed by Congress, and the fact that the banks held such a large per cent. of cash assets became generally known, there was a return of confidence, and the hoarded funds found their way into the banks again until at the end of the year some banks held larger deposits than before the panic.

Decrease in clearings of banks.

While the decrease in clearance of the St. Louis banks for the year 1893 was 7½ per cent., the official returns for the last full financial week ending December 28, 1893, showed the falling off in St. Louis bank clearings as compared with 1892 was less than 4 per cent. The same return showed the falling off for the entire country was nearly 27 per cent., a comparison which evidences the fact that confidence and business activity are being restored in St. Louis more rapidly than elsewhere.

Tonnage.

The tonnage received and forwarded shows a decrease of only 1,866,293 tons or about 10 per cent. less than last year, which is about 99,854 tons in excess of the tonnage of 1891. Decrease in tonnage.

The statement given elsewhere of the business of the St. Louis post office shows a gratifying increase over the preceding year. Post office.

The business in leading articles handled shows an increase in the following articles:—

Flour, manufactured and handled, corn, hay, cattle, sheep, horses and mules, lath, sugar, hides, molasses, coal. Increase in articles handled.

The following articles show a decrease:—

Wheat, oats, rye, barley, bagging, tobacco, lead, hog products, hogs, lumber, shingles, wool, coffee, cotton, rice, nails, potatoes, salt, and butter. Decrease in articles handled.

Miscellaneous.

The mercantile failures in 1893 were comparatively small, the 139 assignments included no disastrous failures; the assets of the failed firms were 435,366*l.*, about 60 per cent. of their liabilities, and taking the population at 520,000 there was but one failure to every 4,000 inhabitants. Mercantile failures.

Some estimated the falling off of business in St. Louis in 1893 at 20 per cent. below that of 1892, but this is largely a matter of guess work. Estimated falling-off in trade.

The grain business of the year 1893 was far from satisfactory under conditions which controlled it, for in addition to the financial restrictions caused by the panic just after harvest, the low stage of the river which cut off the outlet to the Gulf for several months prevented shipments for foreign account, and the low values, lower than ever before obtained, prohibited increased shipments by rail, and the amount of grain exported in 1893 was less than any year since 1888. Grain business.

There was a marked decrease in hog product caused by the abnormal condition of the markets of the country and the financial distress of the latter months of the year. Hog product.

The jobbers and manufacturers made a good record for 1893 although there was a falling off as compared with 1892; the manufactures amounted to 1,710,000*l.* and the jobbing trade to 3,746,030*l.* Boots and shoes.

In 1893 there were received from outside points 749,248 cases as against 828,071 in 1892, and manufactured about 4,500,000 pairs.

The value of the receipts for 1892 was 4,046,800*l.*, a decline of 300,770*l.* in the values of 1893, and the manufacture falls short 165,000*l.* from 1892.

The dry goods trade both wholesale and retail report better results than were anticipated, the early spring trade was equal to that of 1892, but during the panic months of the summer it Dry goods.

fell off fully 25 per cent., and there was a marked improvement at the end of the year.

Clothing. The clothing trade has felt the influence of the financial distress and enforced economy, and the rapid advance in this industry has been checked.

Furniture. The Furniture Board of Trade report a decrease in the volume of business. The manufacture of chairs has become a speciality in St. Louis, and the output has not been diminished.

Drugs. The hard times appear to have had a marked influence on the consumption of drugs, which is reported fully 10 per cent. less than in 1892.

Bricks. Notwithstanding the decreased activity in building, St. Louis produced during 1893, 220,000,000 pressed bricks, for which this city has a high reputation, being equalled only by Philadelphia. There is a speciality in the local clay which makes the St. Louis bricks of exceptional value, and although somewhat higher prices are charged than in other manufacturing districts, St. Louis is constantly shipping brick to New York City, New Orleans, San Antonio, Duluth, Seattle, and other remote points. 2,000 workmen are employed in the manufacture. Ornamental brick of great variety are made; and the English gravel brick are made here.

Hardware. This trade throughout the country suffered materially from the reduction in building, and although St. Louis was in a measure affected thereby, yet one large house reports trade as slightly better in 1893 than in 1892.

Lumber. The lumber trade has been unsatisfactory, there being a falling-off of 1,000 car-loads, and the river receipts were less than in 1892, the amount handled being about 4 per cent. less than in 1892.

Tobacco. St. Louis continues to manufacture more tobacco in every form than any other city in the United States, more men being employed than at any previous time, and few tobacco workers are to be found among the army of unemployed.

There are 12 exceptionally large tobacco manufactories in the city. Their total output is over one-fifth of the total product of the United States.

The value of the St. Louis product approximates 4,000,000*l.* per annum.

Brewing. The brewing industry appears to have suffered less than any other from the financial depression of 1893. The reports from the leading establishments show an increase over 1892. There are more than 25 breweries in the city, in which 3,700 people find employment, exclusive of travellers, agents, and clerks. The output exceeds 60,000,000 gallons per annum.

Labour.

Increase in labour in factories. The report of the manufacturing census taken in 1890 showed an unprecedented increase in the manufactures of St. Louis during the preceding decade.

The Labour Commissioner has just completed a canvas of the

factories of the State, and finds the number of persons in St. Louis engaged in the tobacco or cigar manufacture is 4,758, as compared with 3,968 as shown in the census of 1890. The number of brewery employés has increased from 2,830 to 3,675, and the number of furniture factory hands from 2,800 to 3,600, within the last three years, and 3,526 workers are in shoe factories at the present time.

Building.

The building trade was good during the spring and summer of 1893, the permits showing a value of about 1,600,000*l.* for the first six months, but the withdrawal of capital from the lending market during the summer checked the business, and only about 1,000,000*l.* in value of permits were issued the last six months of 1893, making a total of 2,600,000*l.*

Largest passenger station in the world.

The permit for the new Union Railway Station was issued in 1892, but most of the work on this magnificent structure has been done in 1893. The building is now nearly completed, and is expected to be opened for traffic during the summer of 1894, when the city will have the largest Union Passenger station of any city in the world. Over 800,000*l.* has been already expended in this undertaking.

New fire-proof hotel.

The New Planter's House, or Hotel, is nearing completion, and when furnished will represent an expenditure of 400,000*l.* It is the largest in the city, having 400 rooms, and is fire-proof.

Highest office building.

The loftiest building in the city is the Union Trust Building, 14 stories high exclusive of the observatory and basement. This structure was completed and partly occupied in 1893, and is probably the culmination of the lofty fire-proof office buildings of the city.

Street railways.

It is less than eight years since the first cable-car line was established in St. Louis, since which rapid transit by cable and electricity has been generally adopted, and there are now only two horse-car lines in the city, one of which is soon to be changed to electricity.

Among the extensions is an electric line to Clayton, the county seat. There has been about 1,000,000*l.* spent in reconstruction and improvements during the year 1893, and about 50 miles added to the track mileage.

The number of passengers carried in 1893 was 95,180,550.

Smoke nuisance.

During the year an attempt was made to inaugurate a campaign against smoke. An association has been formed and legislation obtained declaring the emission of dense black or thick grey smoke a misdemeanour.

It appears to have been successfully demonstrated that smoke can be abated without interfering with carrying on of mercantile or manufacturing pursuits, and as the objects of the association are successfully carried out the city will be much improved for residential purposes.

World's Fair prizes.

A St. Louis firm was awarded the highest prize for pressed brick. A St. Louis miller received the highest award for winter wheat flour.

The St. Louis public schools had an enviable notoriety at the World's Fair, receiving 10 highest awards for its exhibit.

The enrolment of scholars is now nearly 70,000, an increase of more than 4,000 over 1892.

City finances. The placing of 250,000*l.* of 4 per cent. renewal bonds, which were placed at par in London by St. Louis in 1893, is an evidence of the high credit the city enjoys abroad.

The total bonded indebtedness is now little in excess of 4,000,000*l.*, and is being reduced yearly both in amount and rate of interest, reducing the burden of taxation accordingly.

Cotton trade. The cotton trade of the season of 1892–93 shows a large decrease over the preceding year, the receipts being only 474,024 bales, as against 723,628 bales in the previous year. But as the crop for 1892–93 was only 6,700,365 bales, against 9,035,379 bales the previous season, St. Louis received about her proper proportion.

Of the shipments 100,072 bales were exported direct to Europe, 85,545 bales going direct to England, mostly by Liverpool. Eastern shippers took 374,275 bales, and Canadian manufactures 24,576 bales.

The stock on hand at the end of the season was 19,502 bales, against 46,402 bales on August 31, 1892.

The highest price for middling cotton was 9¾ c. in December, 1892, and the lowest price was 7 c. in August, 1893.

Building associations. There were 284 building and loan associations, which reported to the Secretary of State assets amounting to 6,303,976*l.* and undivided profits of 1,114,712*l.*, and a number made only partial reports, so that correct statistics of the whole business cannot be obtained.

They have been inquired into by the Labour Commissioner with a view of determining the number of labouring men who are shareholders, but his information is so meagre and not altogether reliable.

He reports that 25 per cent. of the total free shareholders are mechanics and labourers, aggregating 14,014, and that mechanics and labourers to the number of 6,506 are borrowers, and constitute 42 per cent. of the borrowing shareholders, and that 25,606, or 35 per cent., are wage-workers.

It is quite probable that a close State supervision will hereafter be applied to these corporations, and fuller details of the business collated.

COMPARATIVE Business in Leading Articles at St. Louis during the Years 1892–93.

Articles.		Quantity.	
		1892.	1893.
Flour, amount manufactured	Barrels	1,455,342	1,669,048
„ „ handled	„	4,870,852	4,733,838
Wheat, total receipts	Bushels	27,483,855	14,442,999
Corn „	„	32,030,030	33,809,405
Oats „	„	10,604,810	10,056,225
Rye „	„	1,189,153	583,799
Barley „	„	2,691,249	1,986,746
All grain received, including flour reduced to wheat	„	80,548,136	66,348,786
Cotton, receipts	Bales	506,037	638,400
Bagging, manufactured	Yards	13,000,000	12,000,000
Hay, receipts	Tons	131,148	141,238
Tobacco, receipts	Hogsheads	41,936	39,587
Lead „ in pigs of 80 lbs.	Pigs	1,526,481	1,348,544
Hog product, total shipments	Lbs.	369,411,500	285,323,741
Cattle, receipts	Head	801,119	903,257
Sheep „	„	376,922	397,725
Hogs „	„	1,310,311	1,105,108
Horses and mules	„	45,751	46,834
Lumber and logs, receipts	Feet	883,943,163	733,202,730
Shingles, receipts	Pieces	171,942,500	148,589,900
Lath, receipts	„	22,205,300	27,621,750
Wool, total receipts	Lbs.	25,850,690	15,024,436
Hides „	„	38,412,854	45,011,866
Sugar, received	„	250,950,264	273,331,736
Molasses (including glucose) received	Gallons	3,029,050	4,274,080
Coffee, received	Bags	265,096	248,347
Rice, receipts	Packages	110,250	87,959
Coal „	Bushels	82,302,228	87,769,375
Nails „	Kegs	581,278	415,416
Potatoes „	Bushels	1,686,641	1,644,314
Salt „	Barrels	290,487	241,189
„ „	Sacks	48,963	80,198
„ „ (in bulk)	Bushels	473,200	364,020
Butter „	Lbs.	13,401,788	12,575,298
Freight of all kinds received and shipped	Tons	18,388,174	16,519,881

Clearing-house Statement of Banks. Comparative Statement for the Years 1892–93.

Months.	Clearings		Balances	
	1892.	1893.	1892.	1893.
	£	£	£	£
January	19,651,048	22,944,363	2,697,063	2,844,312
February	19,474,092	18,703,938	2,418,822	2,284,239
March	19,887,382	21,674,804	2,398,779	2,241,532
April	20,676,325	21,552,215	3,132,671	2,855,788
May	18,819,728	21,830,253	2,298,265	2,485,067
June	19,915,049	19,164,246	3,062,021	2,181,523
July	20,995,459	16,519,286	2,572,319	1,709,140
August	21,057,826	13,748,315	2,758,353	1,502,441
September	20,346,937	15,087,541	2,313,842	1,906,203
October..	21,385,916	17,287,930	1,989,517	2,108,328
November	21,018,198	19,234,892	2,336,580	2,952,162
December	23,532,519	20,154,975	2,462,274	2,731,258
Total	246,220,918	227,905,348	30,562,106	27,992,723
Decrease, 1893 ..	..	18,315,570	..	2,569,383

CUSTOM-HOUSE Transactions for 1893. Condensed Classification of Commodities Imported into St. Louis during the Year 1893, showing Foreign Value and Duty Paid.

Commodities.	Value.		Duty.	
	£	s.	£	s.
Ale and beer	5,056	16	1,957	8
Anvils	2,494	12	927	10
Art works	3,523	4	614	2
Books and printed matter	488	16	131	5
Bricks and tiles	648	0	207	19
Barley	153	8	102	0
Brushes	2,590	4	1,036	0
Carpets and carpeting	505	0	360	4
Cement	8,984	8	2,057	5
Chemicals and drugs	12,615	4	2,662	18
China and earthenware	25,103	0	14,320	6
Corks, and manufactures of cork	8,233	0	2,106	5
Cutlery	6,780	12	5,383	2
Diamonds and precious stones	13,896	12	1,397	2
Fancy goods	2,673	16	908	14
Fish	3,059	8	1,144	8
Free goods	64,189	0	..	
Glassware	4,094	4	3,066	1
Guns and firearms	3,761	12	998	1
Hops	13,223	12	4,608	10
Ink	495	4	148	11
Jewellery merchandise	541	8	270	15
Marble	1,902	0	1,070	15
Manufactures of cotton	52,359	16	29,526	10
,, linen	17,962	8	7,404	3
,, metal	18,589	16	8,345	3
,, leather	479	12	167	17
,, horn and bone	192	8	57	9
,, paper	5,672	4	1,660	9
,, silk	5,395	0	3,107	8
,, wood	4,862	0	1,707	8
,, wool	17,533	0	13,387	11
Musical instruments	148	8	56	6
Nuts and fruits	453	0	203	13
Paints and colours	1,601	16	404	13
Rice, granulated	25,166	8	3,748	3
Seeds, &c.	1,049	4	197	10
Steel bars	3,268	0	1,298	3
,, wire	24,969	4	12,400	16
Tin-plate (not over 63 lbs.)	10,576	16	8,670	16
,, (over 63 lbs.)	98	16	68	6
Tobacco and cigars	29,062	8	29,670	4
Varnishes	433	8	151	12
Wines, sparkling, &c.	34,387	4	17,284	0
Window glass	26,760	0	7,660	1
Woollen dress goods	2,205	12	2,192	17
Spirituous liquors	3,210	8	4,229	1
Miscellaneous merchandise	18,963	0	5,497	19
Total	491,289	4	204,377	2

NOTE.—The collections from all other sources amounted to 13,398*l.* 6*s.*

Merchandise brought into the Port of St. Louis in Bond from the following Ports of Entry during the Year 1893.

Ports.	Foreign Value.		Duty	
	£	s.	£	s
New York	282,032	0	113,608	0
Baltimore	101,665	0	55,749	0
Philadelphia	44,218	0	19,898	0
Boston..	2,890	0	1,360	0
New Orleans	43,130	0	19,410	0
Newport News	2,474	0	1,113	0
San Francisco	5,632	0	2,534	0
Port Huron	1,533	0	690	0
Detroit	738	0	332	0
Tacoma	2,123	0	955	0
Portland	1,865	0	839	0
Direct to St. Louis	2,984	0	1,343	0
Total	491,284	0	217,771	0
In warehouse, December 31, 1893 ..	45,109	4	33,418	12

United States Internal Revenue collected in St. Louis during the Years 1892–93.

Designation.	Amount.			
	1892.		1893.	
	£	s.	£	s.
Lists (penalties, &c.)	2,383	7	3,814	1
Spirit stamps	669,369	15	401,108	3
Tobacco stamps	692,325	13	605,587	15
Cigar ,, ...	34,130	12	32,292	5
Snuff ,, ...	368	18	329	12
Beer ,, ...	362,868	0	383,293	6
Special tax	32,531	1	33,934	19
Total	1,793,977	6	1,460,360	1
Decrease, 1893	..		333,617	5

DISTRIBUTION and Despatch of Mails during the Years 1892–93.

Description.	Quantity.		
	1892.	1893.	Increase.
	Lbs.	Lbs.	Lbs.
First class matter—			
Letters originating in St. Louis	1,065,357	1,068,697	3,340
Postal cards originating in St. Louis	48,555	49,994	1,439
Second class mail matter—			
Newspapers and periodicals	11,855,552	12,621,960	766,408
Third class mail matter—			
Price currents, circulars, books, &c...	3,901,410	3,972,711	71,301
Fourth class matter—			
Merchandise from St. Louis	1,137,222	1,138,936	1,714
Total	18,008,096	18,852,298	844,202

MONTHLY Rates of Freight on Wheat per Bushel in Cents by Steamer from St. Louis to Liverpool viâ New Orleans during the Year 1893.

Month.	St. Louis to New Orleans.	New Orleans to Liverpool.	St. Louis to Liverpool.
	Cents.	Cents.	Cents.
January..	7½	8½	16
February	7½	8½	16
March	6½	7	13½
April	5½	7½	13
May	5½	6	11½
June	5½	7	12½
July	6	7	13
August	6½	10	16½
September	7	9	16
October	7	9½	16½
November	7	9½	16½
December	7	9½	16½

NOTE.—Wheat one-half cent. more than corn.

DENVER.

Mr. Vice-Consul Pearce reports as follows :—

The year 1893 has been characterised by a very considerable falling-off in the volume of trade in the city of Denver and the State of Colorado. This may be attributed to the heavy decline in the value of silver, and the general financial depression which existed the greater part of the year.

Value of new buildings.

The value of new buildings erected in Denver and suburbs was 600,000*l.*, a decrease of 952,663*l.* Building operations were chiefly confined to residences.

Cost of living.

The cost of living shows no material change, with the single exception of house rents, which have decreased from 30 per cent. to 50 per cent.

Real estate.

Transactions in real estate for the year were 6,427,403*l.*, a decrease of 1,922,736*l.* from 1892.

Value of taxable property.

The total valuation of assessed property in Colorado is 47,734,080*l.*, according to the returns of the county assessors for 1893. This is an increase of 359,190*l.* over the assessed valuation of 1892. Aside from the mineral lands in the State there are altogether 12,248,726 acres of coal, agricultural, and grazing lands, with a total value of 7,999,887*l.* Of the coal lands there are 128,472 acres, valued at 266,954*l.*, assessors' figures. The agricultural lands amount to 4,304,347 acres, valued at 5,410,106*l.* This shows an increase of more than 500,000 acres over the estimate of 1892, which is indicative of the possibilities opened up by irrigation improvements. The grazing lands are estimated at 7,815,917 acres, valued at 2,292,577*l.* There is a falling-off in the grazing acreage due to the corresponding increase in the agricultural total. This does not include 590,043 acres of suburban land around the city of Pueblo, including coal land, which is valued at 517,924*l.*

Clearing-house records.

The records of the clearing-house for 1893 show a total of 37,132,904*l.*, as against 53,169,959*l.* in 1892; a decrease of 16,037,055*l.* In July, 6 of the 11 national banks comprising the clearing-house were forced to close to their doors on account of a "run" on those institutions. Five of these banks have since resumed business, the sixth going into liquidation. The total resources of the 10 national banks at the close of the year were 4,447,196*l.*, a decrease of 1,396,291*l.* from 1892; loans, 2,745,858*l.*; decrease, 797,986*l.* Deposits, 2,805,511*l.*; decrease, 1,289,662*l.* Capital and surplus, 1,591,092*l.*; increase, 109,092*l.*

Manufacturing.

The value of the various manufactured products for the year shows a decrease of 854,730*l.* as compared with the products of 1892. The cause of this large decrease is said to be due to the decreased demand for manufactured articles for the last 6 months of the year. During this period a great many of the manufacturers were compelled to operate their establishments on half time.

TABLE showing the Various Manufactories, Number of Employés, Wages Paid, and the Value of the Product, in the City of Denver.

Description.	Number of Employés.	Wages.	Product.
		£	£
Awnings and tents	30	3,000	15,000
Architectural iron	75	11,000	40,000
Art metal and wire work ..	40	3,600	11,000
Breweries	300	66,000	354,400
Boilers	40	6,000	25,000
Brass foundries..	30	3,600	13,000
Brooms	47	5,000	14,000
Boxes, paper	20	1,460	36,000
„ wood	40	6,000	19,000
Brick, pressed	70	9,600	20,000
„ common..	750	47,600	75,000
Cotton	235	20,000	76,000
Cigars	190	29,400	120,000
Canning..	200	21,800	54,450
Chemicals	22	4,000	18,000
Conifer seed	3	200	2,000
Cloaks, &c.	250	15,000	100,000
Crackers..	80	13,000	100,000
Cornices..	40	11,430	29,000
Confectionery	100	8,400	60,000
Engines..	20	3,400	13,400
Electrical supplies	40	4,000	9,600
Electric lighting	125	22,000	..
Flour	74	7,200	261,000
Flowers..	100	9,000	25,000
Foundries	120	22,400	60,000
Hardware	60	9,360	20,000
Harness..	45	6,892	29,000
Ice	100	16,800	62,000
Ink	4	1,248	3,600
Lapidaries	12	2,160	7,500
Lithographing	110	19,800	93,000
Maccaroni	5	360	1,400
Mattresses	33	5,400	21,080
Millinery	100	5,000	13,000
Machinery	200	33,000	160,000
Marble	30	4,800	24,000
Overalls..	25	1,872	7,800
Printing and binding	300	..	173,100
Pottery	40	4,800	15,000
Plumbing	130	25,000	87,000
Paper	165	28,000	80,000
Packing houses..	150	20,000	548,600
Railroads	2,700	405,000	..
Retorts	40	4,800	17,600
Stamping and sheet iron ..	80	11,600	40,000
Stained glass	20	2,100	7,000
Steam laundries	225	23,460	..
Sewer pipe	60	10,800	15,000
Street railways	625	6,875	..
Shoes	45	4,867	27,000
Spices	20	3,320	42,000
Shirts	50	4,200	13,000
Smelters	1,261	183,268	4,897,027
Saddletrees	6	936	3,600
Soap	40	6,400	57,136
Trunks	25	3,900	11,000

TABLE showing the Various Manufactories, Number of Employés, Wages Paid, and the Value of the Product, in the City of Denver—continued.

Description.	Number of Employés.	Wages.	Product.
		£	£
Tannery..	12	1,800	4,800
Tailors	175	25,250	126,000
Wagons..	100	13,000	50,000
White lead	24	4,388	43,000
Wool mill	20	2,450	8,500
Total	10,078	1,256,996	8,259,593

Railways. There are 20 different lines of railways in operation in Colorado, embracing more than 5,270 miles of track, and aggregating a taxable value of 6,400,000*l.* These railways disburse annually about 2,000,000*l.* to employés, 12,000 in number. The railways of Colorado pass through a country presenting many difficulties not met with in other sections of the country, yet accidents are of very rare occurrence. The total earnings of the Denver and Rio Grande Railway Co. (the largest system in the State) for 1893 were 1,559,876*l.*, as against 1,844,347*l.* in 1892. The earnings of the other lines are not obtainable, but it is safe to say that they suffered from the financial depression in the same proportion. During the year the Union Pacific Railway Company, the Rio Grande Southern Railway Company, and the Atchison, Topeka, and Santa Fé system, the latter operating the Midland Railway Company in Colorado, went into the hands of receivers.

Agriculture. There are 12,000 miles of irrigating ditches in Colorado. They represent an approximate investment of 10,000,000*l.* According to the report of the State Engineer these ditches cover about 4,000,000 acres of land. The same report shows approximately that one-half of this amount, or 2,000,000 acres, are under cultivation.

The value of the product from these cultivated lands for the year is shown as follows:—

Articles.	Value.
	£
Alfalfa	980,000
Hay and grasses	510,000
Wheat..	270,000
Other cereals..	1,800,000
Potatoes	264,000
Vegetables, &c.	1,000,000
Fruits	450,000
Dairy	131,136
Honey..	30,065
Flowers	25,000
Wool	240,000
Total	5,700,201

This shows a decrease of 2,786,628*l.* as compared with 1892.

The returns from the sale of live-stock for the year were as follows:— Live-stock.

Description.	Value.
	£
Cattle	1,625,000
Hogs	37,500
Sheep	300,000
Total	1,962,500

The cattle owned and grazed in Colorado are estimated to number 750,000 head, which, at an average value of 4*l.* each, figure up to 3,000,000*l.*

The several different land offices in the State report that during the year filings and final entries were made on 746,000 acres Government lands, as against 743,000 acres in 1892. Government lands.

The heavy drop in the price of silver very seriously affected the most important industry of the State. The principal silver-producing districts, viz., Leadville, Aspen, and Creede, were for a time panic stricken, and the mines were nearly all closed. As a consequence a large number of miners were thrown out of employment, and it seemed for a while that a great deal of distress would follow. Shortly after the repeal of the Sherman Bill the price of silver showed signs of improvement, and some of the richer mines resumed operations. This found employment again for a number of idle men, while the surplus population migrated to other districts devoted especially to gold mining. This has already resulted in a large increase of the gold product of the State, as the annual statement shows, and gold mining may be said to have obtained fresh impetus from the sudden disparagement of silver. Mines and mining.

The discoveries of gold at Cripple Creek continue to increase, and although the district has only been known as a gold producer for a little over 2 years it is said to have a population of some 10,000 people, and two competing lines of railroad are expected to reach the camp early in the coming summer.

The following is the estimated value of the output for 1893:—

Articles.	Value.
	£
Gold	1,650,003
Silver	3,805,351
Lead	677,748
Copper	102,662
Total	6,336,347

Gold increase, 713,487*l.*; silver decrease, 508,783*l.*; lead decrease, 319,718*l.*; copper decrease, 19,192*l.* Net decrease from 1892, 134,206*l.* The average price of silver for 1893 was ·77 dol. per 1 oz. as against ·868 dol. in 1892.

Iron and steel. The value of the iron and steel product of Colorado for 1893 was as follows:—

Articles.	Value.
	£
Iron ore	29,536
Pig-iron	154,281
Spiegel	14,040
Castings	18,433
Pipe	15,618
Steel rails	306,000
Spikes	2,732
Merchantable iron	53,135
Steel angles	401
Total	594,176

Stone. The value of the building stone output for the year was 110,000*l.*

Lumber. The lumber product for the year is valued at 700,000*l.*

Oil. The total output of the Florence Oil Wells for the year was 756,000 barrels of crude oil, an increase of 26,000 barrels over 1892. The value is estimated at 200,000*l.* Nine new wells were sunk, seven found to be producers, while four of the old wells gave out.

Coal. The State Inspector of coal mines, in his report for 1893, shows an increase of production over 1892 of 175,822 tons. The number of miners employed increased 314, the total being 7,892.

The following table shows the returns by counties for 1892-93:—

Counties.	Quantity.		Increase.	Decrease.
	1892.	1893.		
	Tons (of 2,000 lbs.).	Tons (of 2,000 lbs.).	Tons.	Tons.
Arapahoe	654	633	..	21
Boulder..	569,326	610,583	41,257	..
Dolores	3,475	..	..	..
El Paso..	35,788	29,318	..	6,470
Fremont	497,382	468,334	..	29,048
Gunnison	198,483	240,749	42,269	..
Garfield..	285,550	195,367	..	90,183
Huerfano	541,596	503,912	..	37,684
Jefferson	23,556	12,348	..	11,208
Las Animas	1,329,178	1,543,410	214,232	..
La Plata	89,612	109,336	19,724	..
Mesa	7,300	20,000	12,700	..
Montezuma	675	225	..	450
Park	87,949	99,908	11,959	..
Pitkin	77,526	25,500	..	52,026
Weld	13,184	82,433	69,249	..
Unreported small mines	10,000	5,000	..	5,000
Total	3,771,234	3,947,056	..	..

Summary of Coal Statistics during the Undermentioned Years.

Year.	Quantity.
	Tons (of 2,000 lbs.)
1875..	98,838
1876..	117,666
1877..	160,000
1878..	200,630
1879..	322,732
1880..	375,000
1881..	706,744
1882..	1,061,479
1883..	1,220,593
1884..	1,130,024
1885..	1,398,796
1886..	1,436,211
1887..	1,791,735
1888..	2,185,477
1889..	2,400,629
1890..	3,075,781
1891..	3,512,632
1892..	3,771,234
1893..	3,947,056

The following is a record of imports from Great Britain for the past 7 years :—

Year.	Value.
	£ s
1887..	5,048 12
1888..	8,109 12
1889..	17,585 7
1890..	32,512 4
1891..	26,008 16
1892..	9,357 4
1893..	6,603 16

STATEMENT of Values of Imports from Great Britain Entered at the Port of Denver during the Year 1893.

Articles.	Value.
	£ s.
Ale and stout..	198 0
Antiquities and curios	57 8
Books and other printed matter	59 8
Carpets	110 8
Cigarettes	80 8
Cotton, manufactures of—	
Clothing	9 12
Cloths	106 8
Hosiery	23 0
Laces	69 8
Shirts and drawers	50 0
Earthenware, china, porcelain, &c... ..	512 8
Leather, manufactures of	21 16
Metals, manufactures of—	
Bedsteads	956 12
Bicycles	148 2
Sheep shears	220 0
Other	98 2
Miscellaneous articles	102 8
Personal effects	233 12
Seeds	189 0
Silk, manufactures of—	
Laces	376 8
Wearing apparel and handkerchiefs ..	173 16
Other	12 2
Spirits, distilled—	
Brandy	147 8
Gin	1 12
Rum	13 12
Whisky	346 2
Tin and terne plates	1,204 16
Wines	219 8
Wool, manufactures of—	
Clothing	12 12
Cloths	850 0
Total	6,603 16

The records of the Health Department of Denver for 1892 showed a remarkable decrease in the death rate. The records for 1893 show a still further decrease. Health.

COMPARATIVE Table showing the Mortality for the Past 8 Years.

Year.	Estimated Population.	Total Deaths.	Rate per 1,000.
1886	73,000	1,119	15·33
1887	80,000	1,525	19·06
1888	85,000	1,729	20·34
1889	96,000	1,808	18·83
1890	106,713	2,530	23·71
1891	113,874	2,118	18·51
1892	120,000	1,713	14·48
1893	125,000	1,578	12·70

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UNITED STATES.

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ON THE

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1345.	Galatz	1½d.	1404.	Madrid	1d.
1346.	Trebizond	1d.	1405.	Newchwang	1d.
1347.	Algiers	3d.	1406.	Wênchow	½d.
1348.	Amapala	½d.	1407.	Pakhoi	1½d.
1349.	Cherbourg	1d.	1408.	Hankow	1d.
1350.	Jerusalem	1d.	1409.	Amsterdam	1d.
1351.	Santiago	1d.	1410.	Copenhagen	½d.
1352.	San José	1d.	1411.	Damascus	1d.
1353.	Trieste	3½d.	1412.	Chefoo	3d.
1354.	Madrid	2d.	1413.	Swatow	1d.
1355.	Teneriffe	½d.	1414.	Mannheim	1½d.
1356.	Havana	2d.	1415.	Fiume	2d.
1357.	Paraguay	5d.	1416.	Athens	6d.
1358.	Guayaquil	4½d.	1417.	Söul	1½d.
1359.	Cadiz	1½d.	1418.	Beyrout	1d.
1360.	Marseilles	1½d.	1419.	Berlin	1½d.
1361.	Brest	1d.	1420.	Nice	3d.
1362.	Syra	2½d.	1421.	Yokohama	1½d.
1363.	Suakin	1d.	1422.	Maracaibo	1d.
1364.	Callao	1d.	1423.	Tunis	1½d.
1365.	Piræus	2d.	1424.	Baghdad and Bussorah ..	1d.
1366.	Stettin	2d.	1425.	Rio Grande do Sul	7d.
1367.	New Orleans	2½d.	1426.	Erzeroum	1d.
1368.	Angora	1d.	1427.	Christiania	5½d.
1369.	Antwerp	2d.	1428.	Charleston	5½d.
1370.	Genoa	3½d.	1429.	Meshed	1d.
1371.	Batoum	2d.	1430.	Copenhagen	½d.
1372.	Rouen	2½d.	1431.	Galveston	2½d.
1373.	Santo Domingo	4d.	1432.	Hamburg	2½d.
1374.	Nantes	1½d.	1433.	Brindisi	2½d.
1375.	Taganrog	2½d.	1434.	Gothenburg	2d.
1376.	Ispahan	4½d.	1435.	Kiungchow	1d.
1377.	Leghorn	2d.	1436.	St. Petersburg	½d.
1378.	Caghari	1d.	1437.	Malaga	1d.
1379.	Boston	1d.	1438.	Chicago	2½d.
1380.	Palermo	3d.	1439.	Odessa	2d.
1381.	New York	2d.	1440.	Tabreez	½d.
1382.	Zanzibar	2d.	1441.	Tahiti	½d.
1383.	Naples	1½d.	1442.	Shanghai	2d.
1384.	Constantinople	2d.	1443.	Nagasaki	1d.
1385.	Buenos Ayres	5½d.	1444.	Madrid	2½d.
1386.	Caracas	1½d.	1445.	Malaga	2½d.
1387.	Vienna	1½d.	1446.	Rotterdam	1d.
1388.	Madeira	½d.	1447.	Port Said	1d.
1389.	Panama	1½d.	1448.	Sofia	2½d.
1390.	New Orleans	2½d.	1449.	Warsaw	1½d.
1391.	Manila	2d.	1450.	Africa (Congo)	2d.
1392.	Foochow	1d.	1451.	Jeddah	1½d.

No. 1452.

Reference to previous Report, Annual Series No. 1251.

UNITED STATES.

SAN FRANCISCO.

Consul Donohoe to the Earl of Kimberley.

My Lord, *San Francisco, June* 7, 1894.

I HAVE the honour to enclose herewith, Annual Reports on the Trade, Commerce, and Agriculture of San Francisco, Portland, Astoria, Tacoma, Port Townsend, and Los Angeles for the year 1893.

I have, &c.
(Signed) DENIS DONOHOE.

Report on the Trade, Commerce, and Agriculture of the Consular District of San Francisco for the Year 1893.

ABSTRACT of Contents.

	PAGE
San Francisco Consulate—	
General remarks	3
Shipping and navigation; tables of entrances and clearances of vessels	4
Charters; freights; ship-building	5
California Mid-winter Fair	5
Trade and commerce; table of exports and imports	6
Canned goods; fruit pack	7
Coffee; cement; coal; coke	8, 9
Fruit; rice; salt; sugar; beet sugar; steel; tin-plates	9, 10
Salmon; wine; brandy; wool	10, 11, 12
Value of articles exported and imported, table of	13
Production of precious metals; mines and mining	13, 14
Commercial banks; savings banks	14
Population; diseases; murders; immigration	14, 15
Sailor's wages; desertions; blood money; bonuses	15
Seamen's institute	16
Labour; domestic servants; railway progress	16
Agriculture; barley; wheat; flour; hops; fruit	17, 18
Fruit farming for young Englishmen	18, 19
Ramie; fibrous plants; grapes; dried fruits; olives	19, 20
Sheep; horses; cattle; hogs	20, 21
Temperature; rainfall	21
Business failures	21

Abstract of Contents—continued.

	Page
Portland Vice-Consulate—	
Introductory remarks	22
Shipping; entrances and clearances; table of	22
Freights; sailor's wages; crimping	23
Pilotage; towage; lighterage	24
Exports and imports; tables of	25
Wheat; flour; barley; oats; wool	26
Hops; fruit; timber; fisheries	26, 27
Window-glass; coal; tin-plates; iron; hemp; jute	27, 28
Population and industries	29
Mining; labour; health	29, 30
Public works; railways; jetties; river bars	30, 31
Adjacent harbours; improvements at Yaquina; Coos Bay; Lulalaw; Willapi; Gray's Harbour; Coquille	31, 32
Agriculture; grain; crops; cattle; horses	32, 33
General remarks—	
Taxes; finances; real estate	34
Astoria Vice-Consulate—	
General remarks	35
Seamen; shipping and navigation; tables of	36, 37
Entrances and clearances of vessels; table of	37
Exports and imports; table of	37, 38
Population; industries; salmon-canning; logging, lumber	38, 39
Leather-making; tanning extract; wood-pulp	40
Agriculture	40
Tacoma Vice-Consulate—	
General remarks, State of Washington	41
Health; births; deaths	41
Diseases in cattle; weather and climate	41
Timber; railways	42, 43, 44
Coal; wheat; barley; oats; hay; hops	45, 46, 47
Price of farm produce	48
Horticulture; population and assessment	49, 50
Financial condition; business failures	51
General remarks on Tacoma	53
Shipping and navigation; table of	54
Exports and imports; table of	55
Trade with China and Japan	56
Timber; dry dock industries	57
Public works; financial condition	61, 62
Seattle—	
General remarks	63
Shipping; entrances and clearances	64, 65
Exports and imports; tables of	66, 67
Coal; timber; fish	67
Population; health; diseases	68
Education; public works; street improvements	69, 70
Industry; financial condition	70, 72
Port Townsend Vice-Consulate—	
Trade and shipping; freights; steamship lines	73
Coal; cement; fisheries; health	74
Entrances and clearances; table of	75
Exports and imports; table of	75, 76
Los Angeles Vice-Consulate—	
Introductory remarks	77
Advice to British capitalists	78
„ emigrants	79
Shipping and navigation	82
Trade and commerce	83
Views of present, and prospects of an increased trade with Great Britain	83
Freights; imports	85
Exports; oranges; lemons; raisins; prunes; olives	86, 87, 88
Population and industries	89
Health; new buildings; street railways	89
Beet sugar	92
Public works; railways	93, 94
Agriculture; oranges; scale bugs	94, 97
Olive oil; Irrigation Act	98, 99

General Remarks.

The past year has been a severe test on all business. An exceptional dulness in every branch of trade has prevailed. The United States has passed through a financial cataclysm, and California generally has come out as well as any State in the Union. Home production has diminished, and foreign exports have declined. The first half of the year was marked by a great drain of gold from this country, and the latter half by repeated failures of banks and other institutions.

Failures of commercial firms and manufacturers were filling the columns of the daily press. These failures threw hundreds of men out of employment, and added to the general feeling of uneasiness prevalent before the close of the year. The repeal of the Sherman Bill caused the shutting down of what silver mines were running, and consequent paralysation of business dependent on these mines and their employés. The banks refused to lend money to orchardists in order to enable them to pay the labour necessary for the harvesting of their crops, and money generally was very "tight." The imports to San Francisco have been the smallest for 3 years, and the exports, adding those goods which went to the Eastern States by rail, have but kept pace with the imports. Freight rates have been reduced all round, and by the continuation of the North American Navigation Company's Steamship Line, started in 1892, which issued through bills of lading to New York and other eastern points in opposition to the Pacific Mail Steamship Company which has had the monopoly for several years past, a saving has been made to merchants in this city of several thousands of dollars.

Freights round the Horn from Great Britain and Europe have been very small on the import, and, barring a fictitious fluctuation for 3 months of the year owing to the large exportation of barley, have been small on the export.

Overland freights have been reduced from 10 per cent. to 50 per cent. by the Southern Pacific Railway Company's lines, and the competition of the Oregon Pacific has opened up to San Francisco the trade of the northern towns. The year closes with large stocks of wheat and merchandise on hand, and with fair prospects of an average cereal crop for the northern and central parts of the State at least this coming season. The tonnage on the way to California, and the amount of tonnage available for export purposes will probably prove inadequate to the demand.

Remarks relating to the various subjects connected with shipping, trade, population, labour, and agriculture will be found in this report under their respective heads.

Shipping and Navigation.

The following table shows the number and nationality of

vessels which entered and cleared at this port during the last year :—

Annex A.—RETURN of all Shipping at the Port of San Francisco during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	164	300,583	64	106,672	228	407,255
American, from foreign countries	285	189,090	200	346,929	485	536,009
American, from Atlantic ports of Union	46	87,286	...	...	46	87,286
Hawaiian	17	17,089	24	23,890	41	40,979
Nicaraguan ...	...	...	25	30,575	25	30,575
German	10	15,286	10	17,070	20	32,356
Norwegian	12	18,744	...	...	12	18,744
Italian	9	12,252	...	...	9	12,252
Others	6	4,589	1	272	7	4,861
Total	549	644,909	324	525,406	873	1,170,317
,, for the year preceding ...	602	713,279	304	489,398	906	1,202,677

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	199	271,035	66	110,344	265	381,379
American, to foreign countries	268	224,063	200	344,301	468	568,364
American, to Atlantic ports of Union	21	32,988	...	...	21	32,988
Hawaiian	14	13,473	25	25,816	39	39,289
Nicaraguan ...	1	1,492	24	29,726	25	31,218
German	12	17,652	11	18,777	23	36,429
Norwegian	9	14,510	...	...	9	14,510
Italian	9	12,638	...	...	9	12,638
Others	7	4,246	1	272	8	4,518
Total	540	592,097	327	529,236	867	1,121,333
,, for the year preceding ...	549	667,010	307	490,224	856	1,157,234

NOTE.—The entrances and clearances of American ships do not include the coasting trade, whaling, or fishing voyages.

The number of British vessels entering the port during the year was 44 less than during last year, with a proportionate decrease in tonnage. The clearances of British vessels, however, number but 13 less than 1892. The tonnage, however, is very considerably less. On the whole the return of shipping generally shows a decided falling-off during the year both in numbers of vessels and in tonnage. Nine Italian vessels (sailing) have, however, entered this port during the year, against but one or two last year. No American steamers from Atlantic ports of Union

have either entered or cleared, and the sailing vessels from the same ports show a decided falling-off both in numbers and tonnage.

Charters. There have been years when money has been lost in charters, but seldom has there been one which has been more unsatisfactory to shipowners than that of 1893. There has been a fair grain crop of late years, and a larger one than in 1892, but shipowners did not benefit by this. The financial troubles and the low price of wheat were primarily responsible for these results.

The market started at a very low figure, 1*l.* for iron vessels, United Kingdom for orders; 2*s.* 6*d.* less for direct port. For some time quite a number of vessels loaded owners' account. And in most cases I believe that owners now wish they had let other people do the loading, or had tried some other port and some other trade than the California grain trade.

Freights. During the latter part of the month of January rates increased to 25*s.* for iron vessels for United Kingdom. During the months of March and April freights again dropped to as low as 18*s.* 9*d.* for large vessels. In April freights for May and June loading showed a decided improvement, 2*s.* 6*d.* to 3*s.* 9*d.* more being obtainable. In May, for August and October loading, 25*s.* was reported. In July and August freights ruled from 30*s.* to 32*s.* 6*d.*, iron vessels for United Kingdom, and in September 35*s.* From this on to the end of the year the market continued to drop until 21*s.* 3*d.* to 23*s.* 9*d.* was reached for United Kingdom for orders.

Ferry buildings. The building of the new ferry landings has been delayed pending the straightening out of some technicalities in connection with the bonds, but before long we shall probably have a handsome depôt and accommodating ferry slips erected at the foot of Market Street, the point of the bay at which all the travel converges.

Ship-building. The Union Iron Works have finished the harbour defence vessel "Monterey," and the ironclad "Oregon" has been launched, and is almost ready for sea. The cruiser "Olympia" is also finished. This vessel made as fast time on her trial trip as any cruiser of her class in the world.

Stone buildings. Many fine stone buildings have been erected in the city, and San Francisco can now boast of 12-storey office buildings which rank in appearance with any in the world. Several new streets have been opened, extensive improvements have been made in our park by the army of unemployed labourers, paid by charitable contributions. A fairy city has arisen in the centre of the park, "Sunset City," which embraces exhibits from every part of the world, and holds the representatives of every nation.

California Mid-winter Fair. The Mid-winter Fair has been the Pacific Coast attraction during the past 4 months, and we have vied with Chicago in attracting denizens from all parts of the world into our city.

Trade and Commerce.

The following tables show the exports and imports for the past two years :—

Annex B.—RETURN of Principal Articles of Export from San Francisco during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Wheat and flour	Centals ..	13,523,006	3,182,182	13,108,617	3,787,122
Barley	,, ...	2,556,501	485,735	1,176,207	252,907
Tinned fruit and vegetables	Cases ...	471,427	377,141	465,482	310,446
Tinned salmon	,, ...	132,020	141,319	412,439	382,366
Quicksilver	Flasks ...	10,121	73,981	3,908	23,891
Wine	Gallons ...	533,502	62,471	537,382	70,502
Timber	Feet ...	14,166,957	55,563	21,236,533	96,618
Brandy	Gallons ...	103,606	18,343	250,335	39,116
Other articles...	...	...	1,426,774	...	1,364,753
Total...	...	...	5,823,509	...	6,339,561

NOTE.—A barrel of flour is reduced to wheat at the rate of 3 centals of wheat to 1 barrel of flour.

RETURN of Principal Articles of Import to San Francisco during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Sugar	Tons ...	175,976	2,209,[illegible]	123,[illegible]4	1,448,470
Raw silk	Lbs. ...	2,871,173	1,[illegible]	4,[illegible]	[illegible]
Coal	Tons ...	[illegible]	[illegible]	[illegible]	[illegible]
Coffee	Lbs ...	17,[illegible]	[illegible]	22,[illegible]	[illegible]
Tin plates	Boxes ...	[illegible]	[illegible]	[illegible]	[illegible]
Rice	Tons ...	[illegible]	[illegible]	[illegible]	[illegible]
Tea	Lbs. ...	6,[illegible]	[illegible]	5,274,412	[illegible]
Cement	Barrels ...	[illegible]	[illegible]	[illegible]	[illegible]
Pig iron	Tons ...	[illegible]	[illegible]	[illegible]	[illegible]
Sewing silk	,, ...	[illegible]	[illegible]	[illegible]	[illegible]
Bullion and coin	...	...	[illegible]	...	1,796,077
Other articles	...	...	[illegible]	...	916,751
Total...	...	...	7,[illegible]	...	9,121,590

Exports.

The exports show a falling-off of 516,072*l.*, as compared with 1892; while the imports show a falling-off of 240,585*l.* as compared with the previous year. Besides the above exports of merchandise there were exports of treasure amounting to 2,610,590*l.*, made up principally of Mexican silver dollars and bullion. The exports of merchandise to New York amounted to 947,159*l.*, as compared with 1,709,741*l.* in 1892. This is a decided falling-off in every direction. The exports of wheat and flour show a decided increase in quantity, but a decided

decrease in value over 1892. Still the quantity is not anything like that of the years 1889–91. The export of tinned salmon has decreased very materially, while that of tinned fruit and vegetables shows a small increase. The barley exports are double as much as those of any previous year in the history of the State, and were mostly sold for brewing purposes in the United Kingdom. The exports of timber show a decided falling-off, also that of California brandy. The exports of quicksilver, however, have more than trebled during the year, not so much on account of the increased production as on account of the increased demands; China alone taking 3,800 flasks as against none for the two previous years. Central America, too, took many more, and other countries in proportion—Canada coming in for a share of 280 flasks, for the first time on record. The exports of flour show a decided falling-off, 232,687 barrels less being exported than in 1892.

Imports.

Imports. The imports of raw silk are over 2,000,000*l.* less than last year. The imports of sugar, on the contrary, show an increase of several thousands of tons. The imports of coffee show a falling-off of over 5,000,000 lbs. The imports of coal are slightly increased. Rice about the same. The imports of tin-plate show an increase of 11,677 boxes, though how much of this is for actual use during the year, and how much is stored in bonded warehouse for future use, is hard to get at. The imports of tea are to the advantage of the State. Cement also shows an increase. The imports of scrap-iron have fallen off 11,326 tons. The reasons for this falling-off are generally assigned to a high protective tariff and a great ruling depression in trade. Pig-iron shows a falling-off of over 4,000 tons; the same reasons may be ascribed for this as for the former.

Canned goods. The receipts of canned salmon at San Francisco during the past year totals up to 791,702 cases, which include 1,399 cases California, and 790,363 cases from Oregon, Alaska, and British Columbia. The canning of tomatoes has increased to 451,000 cases of 2 dozen cans each, or nearly twice that of the production of 1892.

Canned fruits. A considerable amount of fruit has been packed during the past year, mostly apricots, plums, and peaches—quite a number of carloads going to eastern points, at prices considerably below the packing cost of 1892. Efforts to place lines of the varieties used in the United Kingdom have practically failed, and canners who have made great efforts to that end are still holding on to their stocks without any encouragement. It is probable, however, that the last part of the year was the turning point in value both at eastern points and abroad.

Fruit packs. The following is an estimate of the pack of this season by a leading packer:—

Articles	Quantity
	Cases.
Apples	5,000
Apricots	150,000
Asparagus	7,000
Blackberries	10,000
Cherries (white)	35,000
.. (black)	25,000
Currants	1,000
Gooseberries	3,000
Grapes	20,000
Nectarines	5,000
Pears	40,000
Pease	70,000
Peaches	100,000
Plums	12,000
Quinces	2,000
Raspberries	2,500
Strawberries	2,000
Total	489,500
Miscellaneous—	
Pie fruits	30,000
Tomatoes	451,000
Jams and jellies	15,000
Total	496,000
Grand total	985,500

The consumption in the State and the exports by sea and rail have reduced this stock very considerably.

Coffee. Imports of this article have been smaller than for a long series of years, while prices have been slightly better than in 1892. The falling-off of imports have principally been in Central American coffee. The consumption of coffee from this country for the first half of the year amounted to 61,847 bags. Large sales of Guatemala coffee were made in September.

Cement. The imports of cement, which show a considerable increase over that of last year, but make the local market more stagnant than formerly. No visible signs of large sales exist. The market is overstocked.

Coal. The imports of coal and the various sources from which we have derived our supplies are as follows :—

From—	Quantity.	
	1893.	1892.
	Tons.	Tons.
British Columbia	463,800	407,700
Australia	155,900	247,900
Great Britain	158,800	200,400
Japan	7,758	4,220
Total	786,258	860,220

To arrive at a correct statement of the entire consumption of the State, including the arrivals by water at San Pedro, Port Los Angeles, and San Diego, and what was brought by rail from the eastern States—Green River, Cedar River, Carbon Hill, and Coos Bay mines, being all added together, we have a total of 11,479,785 tons. The average price during the year on all these foreign coals landed here would be 1*l.* 10*s.* per ton. This includes a duty of 3*s.* per ton. It appears a travesty on common intelligence for this coast to have any hand in continuing this duty, as the State contributed during the past year 138,000*l.* out of a total revenue collected by the United States for coal duties of 200,000*l.* Our shipbuilders, gas companies, rolling mills, nail and iron factories, foundries and railroads are the sufferers by this tariff. Coal duties.

The imports of coke, all foreign, this year, were 29,645 tons. Coke.

An authority on the shipment of California green fruit gives his ideas of the reason why California fruit realises such small prices in the eastern market. Aside from delayed slow trains, he says "the fault lies with the packer, who usually places 20 lbs. of fruit in a box only fit to carry 15 lbs., and the tightness and exclusion of air from the centre invariably makes that part at least not saleable, and seriously affects the quality of the whole box." California green fruit.

Over 5,000,000 dozen eastern eggs were imported to this State during the year, and the total local consumption was over 7,000,000. This shows that there is room for enterprising men to embark upon a business which must, in this favourable climate, perforce be a profitable one. Eggs.

The pack for 1893 is estimated at 3,000,000 boxes. The shipment from the southern part of the State to San Francisco of new raisins has been 2,500,000 boxes. The majority of these raisins are packed in the San Joaquin Valley. Raisins.

The falling-off in the import of this article has been phenomenal, particularly from China, though we imported from Italy 29,173 lbs. The exports of rice by sea amounted to 3,511,083 lbs. Imports from China amounted to 28,066,894 lbs.; Hawaiian Islands, 6,133,800 lbs; Southern miscellaneous, 5,952,310 lbs. Efforts are being made to have the overflowing lands adjacent to the Sacramento River used for rice cultivation. Endeavours have been put forward to create a State subsidy for planters. Rice.

Salt. The receipts of English table and dairy salt were very heavy or about 50 per cent. more than in 1892. The totals were 20,443,145 lbs. of English salt; 669,716 lbs. of German. The price here was about 2*l.* 18*s.* per ton for whole cargoes on an average.

Sugar. The sugar trade has been one of the largest for years. Our principal supply coming from the Sandwich Islands. This amounted to 317,279,963 lbs. Batavia, 21,442,858 lbs.; China, Formosa, and Swatow, 14,504,202 lbs. The beet sugar crop, grown in California, was of unusual dimensions, amounting to

Home-grown beet sugar. 30,000,000 lbs. A bounty of 2 c. per lb. is granted by the United States authorities for home-grown beet sugar, and during the fiscal year 1892–93 the amounts paid to beet sugar companies in California amounted to 90,838*l.* The withdrawal of this bounty would result in the closing down of every factory in the State, with a great consequent loss to farmers.

Steel. Iron and hardware. The imports of steel for the year show a marked falling-off. The demand for iron has been as light as that for steel, and every branch of the hardware trade shows great stagnation. The low rates for freight prevailing throughout the year caused a lowering of prices on old stock, and consequent loss to the holders thereof, in order to compete with the importers under the low rates.

Tin-plates. The increase in the imports of this article are not to be taken as a comparative increase in the canning business, as quantities of this imported plate lies in bonded warehouse until called for. Had farmers been able to borrow money in order to harvest and to pack their crops, we should doubtless have seen a greater stimulation of this importation, as the United States custom

Rebate of duty for exporters. authorities rebate nearly the whole of the duty first imposed. When proof is given that the tin-plate is made into cans and filled with fruit for exporting purposes a charge of 1 per cent. only is made.

Tobacco. Imports of tobacco have been light, 7,792,400 lbs. of manufactured; 2,211,940 lbs. of leaf, a total of 10,004,340 lbs. Imports of Cuban tobacco, mostly cigars, 69,043 lbs. Total import of cigars, 2,433,570 lbs.

Hides and leather. This trade has shared the general depression. The receipts for the year being much less than any of the past six. 25,622 rolls were received.

Matting. The imports of matting, almost all from China and Japan, give 49,539 rolls, the largest since 1889. A large carry-over stock is on hand.

Grain sacks. About 27,500,000 grain bags were used in this State during the last year for the sacking of wheat and barley. The supply on hand promises to equal the demand for this season.

Salmon. The salmon pack for 1893 was, with one exception, the largest ever put up on the coast; that exception was 1889. The increase was in Alaska and British Columbia.

Place—	Quantity.
	Cases.
Alaska	637,120
British Columbia	607,832
Columbia River	388,889
Outside rivers	50,000
Total	1,683,841

The Frazer River pack which is included in, and forms nearly the whole of, the British Columbia amount given above, was the largest in the history of the industry. Every fourth year the run of salmon on the Frazer River is very light owing to some inexplicable cause. Since the establishment of the hatchery, however, the run in off years has improved. The total exports by rail to central and eastern points amounted to:—

From—	Quantity.
	Lbs.
San Francisco, canned	16,844,000
„ pickled	3,872,000
Interior, canned	852,000
Total	21,568,000
Increase over 1892 of ..	13,210,000

NOTE.—48 1-lb. cans constitute a case.

French wine. The imports of this article are given as 50,276 gallons, or nearly double that of 1892, but the amount cannot be relied upon as accurate, because so much California wine goes abroad to return in French bottles with French labels, and is sold as French claret.

Foreign brandies. The imports for the last year amounted to 11,537 gallons. The total imports of foreign spirits are given as 152,267 gallons, a slight increase over 1892.

California wine. The receipts of California wines at San Francisco for the past year are given as 11,874,484 gallons. The overland shipments amounted to 8,523,200 gallons. The exports by sea amounted to 3,697,957 gallons.

California brandy. The receipt of California brandy at San Francisco for the past year amounted to 782,355 gallons. The shipments to eastern and overland points amounted to 474,200 gallons. The exports by sea amounted to 309,958 gallons.

Making a grand total of:—

	Quantity.
	Gallons.
Exports of wine	12,221,157
„ brandy	784,158

Wool.

The total clip of Californian wool amounted to 33,169,375 lbs. The shipments from the State amounted to:—

	Quantity.
	Lbs.
By rail	21,242,156
„ sea	776,178
Total	22,008,334

The prices for California grown wool varied from 2*d.* to 8*d.* per lb., according to quality and location of growth. The wool trade of 1893 has been the most disastrous in the history of the business. The decline in prices has been something frightful. Until Congress definitely settles the rate of tariff on wool, merchants and growers will stand off and wait results. Should the tariff be removed entirely, a large quantity of Australian wool, which can under-sell the California product, will be brought into this market. A great number of sheepmen did not shear this fall, owing to their inability to secure advances on the crop to pay their shearers. Very little wool has been used for manufacturing purposes despite the prevailing low prices.

The following table shows the value of all exports and imports:—

Annex C.—TABLE showing Total Value of all Articles Exported from and Imported to San Francisco from and to Foreign Countries during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	3,251,786	3,831,688	853,688	897,359
Hawaiian Isles.. ..	597,066	510,996	1,568,510	1,568,511
China	511,846	540,778	1,026,711	1,305,780
Central America ..	413,018	438,079	663,430	663,430
Mexico	251,771	281,710	199,152	180,049
Canada	142,961	106,760	413,326	359,258
Australasia	131,874	199,214	181,691	263,017
Japan	110,895	112,376	1,408,698	2,618,398
Pacific Islands.. ..	90,900	83,648	87,565	52,242
France	84,875	17,005	174,701	211,524
South America.. ..	55,726	61,347	83,431	58,516
Germany	37,615	46,576	149,737	170,793
Asiatic Russia	28,550	22,579	71,082	76,044
Belgium	20,005	76,817	128,704	171,515
East Indies	11,179	8,688	377,354	376,384
Other countries ..	83,442	1,320	453,321	129,331
Italy	.. ..	..	34,854	19,439
Total	5,823,509	6,339,581	7,881,005	9,121,590

The exports to Great Britain show a considerable falling-off. The imports, too, are smaller than in 1892. The majority of vessels clearing here for the United Kingdom leave for orders with their cargoes unsold. These are all included in Great Britain exports, though their final destination is often a continental port. The imports from Japan show a tremendous falling-off.

Messrs. Wells, Fargo, and Company's annual statement of precious metals produced in the States and territories west of the Missouri River (including British Columbia) during 1893, gives in the aggregate:—

Year.	Gold.	Silver.	Copper.	Lead.	Total.
	£	£	£	£	£
1893 ..	6,840,538	7,698,304	4,726,267	1,551,208	20,816,318
1892 ..	5,969,489	10,121,520	3,874,103	2,286,789	22,251,901

Colorado produced the greatest amount of silver, and California the largest quantity of gold of all the States included in this report. The exports of silver during the past year to Japan and China from San Francisco amounted to 2,348,332*l.*

Mines and mining.

Messrs. Wells and Fargo's table of production given above shows an increase in gold, and a heavy falling-off in the value of silver produce; taken together, the total values of both gold and silver

show a falling-off. This has been partly due to the drop in the price of silver and partly to the closing down of mines consequent on the repeal of the Sherman Act. In Nevada an average of 40 per cent. of the production of the so-called silver mines is composed of gold.

Hydraulic mining in this State has, by the passing of the "Caminetti Act," again been legalised, and will doubtless recover some of its old time importance.

For the past 10 years nothing has been done in hydraulic mining.

Commercial banks.

From the bank commissioner's report I find the condition of the commercial banks of this city, at the close of the fiscal year, June 30, 1893, to be as follows:—

To—	Amount.
	£
Loans on real estate	672,163
,, stock, bonds, &c.	1,846,271
,, other securities..	863,615
,, personal securities	5,176,130
Money on hand, &c.	1,979,034
Due from other banks and bankers ..	1,450,705
Bank premises	225,067
Other real estate	186,738
Invested in stocks, bonds, &c.	407,899
Other assets	664,609
Total	13,472,231

Savings banks.

The report further shows the condition of the San Francisco savings banks to July 1, 1893:—11 banks, total resources, 23,618,870*l.*; the reserve fund amounted to 792,567*l.*; the rates of interest paid to depositors by savings banks ranges from 4½ per cent. to 5½ per cent. according to circumstances.

Money to be had from the banks at from 7 per cent. to 8 per cent. on real estate.

Population.

Diseases.

The health officer's last report, which is made up to June 30, 1893, classifies the deaths in this city as follows:—

Description.	Number of Deaths
Local diseases	3,083
Constitutional diseases	1,172
Zymotic diseases	762
Development diseases	677
Violent deaths	367
Total	6,061

This shows a decrease of 850 deaths over 1892, which may be attributed to the better cleansing of the city streets and sewers. The city was threatened for some months with an epidemic of small-pox. By prompt methods of isolation, vaccination, and disinfection it was averted. The number of vaccinations for the year were 4,555. The total number of births reported for the year were 3,889.

The following is taken from the health officer's report in regard to births :—

"This is a much smaller number than should have been reported, and shows great laxity on the part of physicians who should be more prompt in aiding this department to keep up carefully prepared statistics."

Murders.

From the records of the Chief of Police I find that over 250 murders have been committed in San Francisco during the past 9 years, and only six white men hung; and in the year ending June, 1893, I find 30 murders, 11 cases of manslaughter, and not a single conviction in one of these cases.

Passenger movement.

The arrivals and departures for the past 3 years compare as follows :—

Past Three Years.	Arrived.	Departed.
	Number.	Number.
1891	91,568	63,319
1892	94,808	66,965
1893	98,787	78,572

Immigration.

The year was not one calculated to encourage permanent immigration, though the Mid-winter Fair was looked upon as a great inducement to bring people to the coast, some of whom, it is hoped, may settle here. It is, however, a significant fact that there were twice as many unemployed in Chicago 1 month after the fair than for 3 months before it. Of the number of emigrants arriving at San Francisco the immigration commissioner reports, 4,333 males, 1,050 females, total, 5,383. Of these, 238 were under 15 years of age. This is a falling-off of over 1,000 from last year. Among the immigrants were 2,036 Chinese, 645 Japanese.

Whale catch.

The catch for the season of 1893 gives 6,742 barrels of oil, 310,241 lbs. of bone, and 2,355 lbs. of ivory. The prices realised were good, especially so with regard to oil. These figures are the receipts at San Francisco. Sailing vessels did so poorly in comparison with steamers that but few of the former will be dispatched this season.

Sailors' wages and desertions.

The low wages prevalent during the year for deep water sailors have resulted in much fewer desertions than heretofore. Boarding masters and crimps losing one of their chief arguments to induce sailors to leave their ships. Then, again, the coast trade has been so dull that no demand for men came from that quarter.

Blood money and bonus.

Blood money in San Francisco has been completely done away

with, and I feel safe in predicting that it will be a long time before, if ever, this iniquitous charge again becomes prevalent. The small amount of tonnage leaving the port in the early part of the year will keep a sufficient supply of sailors on hand to prevent any material rise in wages.

Seamen's institute.

I have before me the first annual return of the seamen's institute of this port. This commendable institution was started by voluntary subscription among the various business men, &c., of this city, and by subscriptions from owners of British vessels trading to this port, for the purpose of providing recreation and reading rooms for sailors, apprentices, and officers of British or foreign vessels trading here. And, as it is estimated that over 25,000 seamen visit San Francisco annually, the need for such a place of healthy resort was urgently demanded. It is a significant fact that during the 8 months the rooms have been open only four apprentices have deserted their ships, whilst in the previous 2 months at least fourteen did so. The rooms are provided with billiard tables, the papers, home and foreign, &c., while downstairs is a large room furnished with a piano and organ, and used for services, concerts, &c. The undertaking is presided over by the Rev. J. Fell, M.A., who came out from Liverpool to initiate the idea. It is to be hoped that sufficient subscriptions may come to hand to continue this laudable undertaking.

Desertion of apprentices.

Labour.

Domestic servants.

Good domestic servants are in great request in California. Though there are quantities of women out here who go out to service, few are really proficient, and hardly any have had training. Servants', that is, house servants', wages are from 4*l.* to 7*l.* per month. A good general servant gets 5*l.* to 6*l.*, but for this she must be able to bake bread and make eatable pastry. No white male labour is employed in the kitchens of private houses. (I refer to white labour as opposed to Chinese.) These latter are very generally employed as cooks and general servants; though a great many families have an aversion to them, or are so situated that a woman's help is wanted in the house. Wages of house and parlour maids are from 4*l.* to 5*l.* per month. Trained mechanics and artisans can, in prosperous times which do not exist now, nearly always obtain employment, though the unions are not admitting any but American citizens to their benefits. Another class of workers I would strongly discourage from coming out here, and these are governesses. I am continually applied to for advice on this point, and am only able to repeat that there is no field here for these people, or for the so-called lady-helps, who often apply to me for information.

Governesses.

Railway progress.

A new transcontinental road is promised to San Francisco. The San Francisco and Atlantic Railroad will, it is said, form a junction with Atlantic and Pacific in either King's or Los Angeles county, California. All the contracts have been let for the construction of 300 miles of the road from this city south.

The wreckage of a large raft from Mendocino county with over 3,000,000 feet of lumber and 40 tons of chain proved a severe blow to the promoters of the scheme, and has very clearly demonstrated the inability of conducting this style of lumber shipment on this coast during at least 9 months of the year. Transportation of timber.

Agriculture.

Fair prices were realised during the year for barley, and 4,228,982 centals of California barley were received at San Francisco during the year, and 2,036 centals of Oregon barley. The average price throughout the year was, however, about 2½*d.* per cental less than 1892. There was a specially good demand for brewing barley from the United Kingdom. The large exports of this cereal have been mentioned in a previous part of this report. Barley.

The crop of wheat was a good average one, and about 550,000 tons; and as much as 650,000 tons of old wheat on hand, giving 1,200,000 tons, of which three-quarters was available for export. Prices were the lowest ever known, and by a combination the price of local wheat was forced up to such a point that for the last few months in 1893 very little exporting was done, as exporters could realise better prices by selling here to the combination than by exporting. The whole State suffered, as it always must by these local speculations. On the last day of the year 1893 it was estimated that 700,000 tons were available for export. Wheat.

The receipts of flour at San Francisco show a decided falling-off, nor do the exports come anywhere near those of previous years. 250,000 barrels less than in 1892 left for the United Kingdom alone. China and Japan, however, took a larger quantity than in the previous year. Flour

The following table gives the receipts of various articles of produce at San Francisco:—

Articles.		Quantity.
Oats	Centals ..	566,897
Hops, Californian	Bales	9,806
Indian corn	Sacks	372,994
Rye	„	38,595
Beans	„	523,935
Potatoes	„	1,100,715
Onions	„	119,831
Honey	Cases	10,665

The receipts of butter and cheese at this port for the past year was as follows:— Butter and cheese.

Sources.	Quantity	
	Butter.	Cheese.
	Lbs.	Lbs.
California	16,164,300	5,156,000
Oregon	656,300	572,500
Eastern	217,300	1,021,500
Totals	17,037,900	6,750,000

Hops. If more care and attention were given to the picking and cleansing of California hops, better prices would be realised. A leading hop dealer submits the following report:—

"We estimate the 1893 Pacific Coast crop (this includes Oregon and Washington) at about 120,000 bales to 125,000 bales, seven-eights of which have been moved during the past 3 months at prices ranging from 7*d.* to 10*d.* per pound according to quality and district. The hops produced in Sonoma county brought the best prices mainly for export account. The Russian River and Yolo districts and also the State of Oregon produce some very fine goods, which fetched within a penny or two of our best 'Sonomas.' The remaining stock of about 15,000 bales consists mostly of 'Washingtons' and 'Sacramentos.' Choice grades are practically exhausted."

Onions. A decrease of about 50,000 sacks tended to send up the prices of onions very materially during the early part of the year.

Potatoes. The falling-off of the receipts of potatoes amounted during the past year to 350,000 sacks. 1892, however, was a phenomenally large year. During the latter half of 1893 prices have been considerably lower, and there is a considerable stock of goods on hand.

Fruit. At a recent meeting of the State Horticultural Society held in the city, in the course of discussion, it appeared that in a large deciduous orchard at Yuba city the cost of production varied from 8*l.* to 12*l.* per acre, according to the size of the crop. The gross sales averaged about 20*l.* an acre In one season, however, as much as 18*s.* to 1*l.* a tree had been received from an orchard of 350 "Deckar" peach trees. Another orchard of 98 peach trees had netted its owners 170*l.*; these were of the "Georges Late" variety. Such returns are, however, exceptional. One of the gentlemen in session said, "I do not believe that any orchard in this State, taking one year with another, gives a gross return of more than 30*l.* per acre." Accepting this to be a fact, and deducting from 8*l.* to 12*l.* for cost of production per acre, as above, and adding to this latter charge the possibilities of a long railway journey to the nearest large market, the net profits per acre would be very small.

Fruit farming for young Englishmen. There is no doubt in my mind that fruit farming in California as an occupation for the average Englishman is a dire failure.

I have seen it exemplified countless times. Various Englishmen have come out to this State under a sort of contract, with the representatives of agents in London, to work on ranches out here as farm pupils, or anything else they like to call themselves. The principal object of the agents in London, however, appears to be to get the young men's premium. After that is secured their interest ceases. These young men have been cruelly victimised, and by false and dishonourable misrepresentations have found themselves utterly out at elbows and without a chance or the money to return to their homes, and have to obtain employment washing dishes in a restaurant or any other work of equally disagreeable and unremunerative nature.

Intending settlers.

My advice to intending settlers is, when coming out here, to leave their money at home until they have been at least a year in the country, and have worked on a ranch or fruit farm, possibly only getting their board for their services, and have seen for themselves how things are managed, and what profits, if any, are to be made out of the business. Personal inspection of this kind is worth far more to the young man than all the pamphlets and papers he can read on the subject.

I have been called upon by several young fellows, sons of well-to-do people at home, saying they were the victims of this or that firm in England, who had sent them out here to work on a fruit farm, that they had found the life in some cases unbearable, and in other cases the parties to whom they were sent did not own the land at all, or that they were sent to other parties who referred them to friends of theirs, &c., and that they were utterly destitute, and in need of the necessaries of life. Of these men some few find good employment after a time, but the majority drift into the occupations I have quoted before, until relieved by their families.

The climate on most of the fruit farms in California is hot and malarial, as the soil is nearly all irrigated, and are in consequence very unhealthy places to live in. The northern part of the State in the higher districts is more healthy than in the valleys, which are principally planted to fruit. The summers are not nearly so hot, and the winters are colder.

Ramie.

For some years experiments with the ramie plant have been going on in a small way in California. No cheap and effective method has yet been discovered (at least it is not known in this State) of preparing the plant for the use of the manufacturer. Agriculturists will not grow a product for which they can find no market. The Japanese prepare the fibre by hand, but labour is too high for that in this State. California has offered a bounty for the growth of ramie, but small hopes are entertained of any extensive cultivation of this plant. Hemp and flax are altogether imported, the former from Manila, and the latter from India. The palms which grow in abundance in this country for ornamental purposes have never, to the best of my belief, been experimented with for the purpose of extracting the fibre, though

State bounty.

it seems to me a good prospect of ultimate success might be attained in this direction.

Fibrous plants.

The value of the annual importation of fibrous materials imported into the United States amounts to about 10,000,000*l.*, one-half of which could be produced in this country. It is well known that the pine-apple can be grown in Southern California. Enough of this fruit is produced to demonstrate the proposition of successful culture. The Indian pine-apple fibre is woven into the most delicate fabrics. Here, as with ramie, the excessive high price of labour is the chief obstacle we have to contend with. No less than 1,000,000 acres of flax are grown in the United States for the seed alone, but the only oil-mill in this city has to import its seed from India. Hemp for cordage is grown in Kentucky and Missouri, and in other south-western States, the soil of which does not come up to the rich bottom and reclaimed lands of California.

Grapes.

The number of acres under cultivation in this State with grape vines is very hard to arrive at, as vineyardists are constantly changing their minds as to the best kind of grapes to grow, and prices having been so low in the past few years a great many instances are noted of whole vineyards having been pulled up and fruit trees having been planted in their places. The phylloxera too has caused extensive damage.

Dried fruits.

The raising of fruit for drying purposes is very extensive, far better results being obtained than by selling green fruit, which, owing to long railway journeys, has to be picked in a very unripe condition to stand the trip, and is so insipid and flavourless that a repetition of previous trials have been abandoned, though it is proposed to run this summer a faster fruit train to Chicago, making the run from Sacramento in 120 hours. The sales of California fruit in London last year were a signal failure, and are not likely to be repeated.

Pampas' plumes.

A considerable quantity of pampas grass is grown in the southern part of the State, and lots of plumes shipped annually to England. The demand is, however, greater than the supply, and I believe this would be a profitable channel for the investment of small capital.

Olives.

The cultivation of the olive has been extensively followed in California for some years, though no figures are to hand of the increased acreage during the past year. The oil manufactured in California is of far greater purity than that imported here from France and Italy, and, owing to that fact, cannot compete in price with the less pure article.

Sheep.

The unsatisfactory prices realised for wool during the past year have caused sheep men to go more into the production of mutton by fostering the breed of the California mustang sheep which is a large beast, leaving the finer grades of merino and fine-wool sheep alone.

Horses.

In many parts of this State the horse breeding business has been curtailed the prices being too low to warrant any large production, and the scarcity of rain in the southern portion of

the State has caused breeders of all live stock to kill or get rid of everything.

The prices paid for cattle have also been very low, and the prospects for any great increase in this line are very small. Quantities of cattle have been shipped from Arizona to New Mexico. Cattle.

Hogs are in demand at very good prices. Stock hogs are not in demand at all. The present low price paid for grain warrants the grower in fattening hogs for the market, and thus competing to some extent with the grain-fed hogs of the Eastern States. Hogs.

The amount of bacon imported into this State every year from the Eastern States is tremendous. It is far sweeter and firmer than the California bacon and ham from being grain-fed. Bacon.

Monthly and annual mean temperature at various points throughout the State is given below :— Temperature.

Stations.	Mean.		
	January.	July.	Annual.
	Degrees.	Degrees.	Degrees.
Delmonte	49·4	61·8	56·6
Fresno	44·3	86·4	64·4
Glen Ellen	44·9	69·4	58·4
Keeler	43·3	83·8	61·4
Los Angeles	54·6	70·6	62·6
Sacramento	44·4	70·5	60·0
San Francisco	47·4	58·1	54·9
Summit	22·3	65·2	41·7

The rainfall at San Francisco for the year ended June 30, 1893, is given at 21·75 inches; Fresno, 8·70 inches; Glen Ellen, 54·29 inches; Los Angeles, 26·60 inches; Keeler, 5·07 inches; Monterey, 22·87 inches. Rainfall.

I am indebted to Messrs. Bradstreet's Mercantile Agency here for the following figures, which give the business failures in this State and city separately during the year ended December 31, 1893 :— Business failures.

	Number.	Amount.	
		Assets.	Liabilities.
		£	£
California	787	1,953,690	2,670,434
San Francisco only	285	1,065,885	1,511,716

All the values in the foregoing report are taken at the rate of 5 dol. equal to 1*l*.

Portland, Oregon.

Introductory remarks.

The past year has been one of continued depression in all branches of business, and although there are signs of improvement no very general change is anticipated for some time to come.

Imports and exports have fallen off materially in value. The actual quantity of wheat exported was greater, but prices were so low that the value was very much less.

Freights were also much lower than last year in consequence of the low markets for wheat throughout the world.

Shipping and Navigation.

Of the tonnage employed in the foreign trade, 82 per cent. was British, which is a little over last year. The number and nationalities of vessels which entered and cleared are given in the following table:—

Annex A.—Return of all Shipping at the Port of Portland, Oregon, during the Year 1893.

Entered.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	65	97,928	6	2,567	71	[illegible]
American, from foreign countries	3	1,555	24	15,920	27	17,475
American, from Victoria ports ...	11	[illegible]	...	...	11	[illegible]
American, sailing	14	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Norwegian	3	[illegible]	...	...	3	[illegible]
German	1	[illegible]	...	...	1	[illegible]
Total	97	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
,, for the year preceding ...	125	124,857	283	[illegible]	[illegible]	[illegible]

Cleared.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	98	[illegible]	7	[illegible]	70	[illegible]
American, from foreign countries	15	21,098	19	12,824	34	[illegible]
American, from Victoria ports ...	2	[illegible]	...	...	2	[illegible]
American, sailing	10	[illegible]	146	[illegible]	159	[illegible]
Norwegian	3	[illegible]	...	...	3	[illegible]
German ...	1	[illegible]	...	...	1	[illegible]
Danish ...	1	[illegible]	...	...	1	[illegible]
Total ...	[illegible]	[illegible]	[illegible]	[illegible]	270	[illegible]
,, for the year preceding ...	121	[illegible]	277	[illegible]	398	[illegible]

Freights.

Rates of freight during the year were lower than in 1892. In January, vessels arrived were chartered at 1*l.* 7*s.* 6*d.* to 1*l.* 10*s.*; in February, 1*l.* 7*s.* 6*d.* to 1*l.* 8*s.* 9*d.*; in April, 1*l.* 2*s.* 6*d.* to 1*l.* 5*s.*; in May, 1*l.* 7*s.* 6*d.*; in June, 1*l.* 8*s.* 9*d.*; in August, 1*l.* 15*s.*; in September, 1*l.* 17*s.* 6*d.* to 2*l.*; in October, 1*l.* 17*s.* 6*d.*; in November, 1*l.* 15*s.* 3*d.* to 1*l.* 12*s.* 6*d.*; in December, 1*l.* 13*s.* 3*d.* to 1*l.* 13*s.* 9*d.* These rates are for iron or steel vessels to United Kingdom for orders, including Havre, Antwerp, or Dunkirk at the same rates. The highest rate paid during the year was 2*l.*, and the lowest, 1*l.* 2*s.* 6*d.* Average, 1*l.* 12*s.* 6*d.* for iron vessels. Only 7 wooden ships loaded grain, the average rate on these being 1*l.* 9*s.* 5*d.* Highest, 1*l.* 15*s.*, lowest, 1*l.* 2*s.* 6*d.* The direct option was generally at 1*s.* 3*d.* less, but in many charters there was no deduction, and in some, 2*s.* 6*d.* less. Unlike last year there was generally a profit made on charters effected before arrival.

Shipping engagements.

The following were the tonnage engagements for sailing vessels during the last 2 years, exclusive of coasting voyages:—

Cargoes.	Tonnage.	
	1893.	1892.
Grain and flour	115,660	114,136
Salmon and assorted	1,400	3,045
Timber	8,605	9,329
Miscellaneous	2,957	6,424
Total	128,622	132,934

Sailors' wages.

During the year there has been little difficulty in securing crews, and wages of A.B. seamen were 5*l.* during first half and 4*l.* during the last half of the year.

Crimping.

Crimps are now pretty well controlled in these ports, and have not recently given much trouble. No one need be allowed on board a vessel without the concurrence of the master.

Action under treaty for arrest of deserters.

Several arrests were made under the recent treaty for arrest of deserters, but the expense attending action thereunder deters shipmasters from taking advantage of its provisions.

United States Courts decline jurisdiction in wages' suits.

United States Judge Bellinger has made it a rule of the Admiralty Court here that he will decline to take jurisdiction in suits for wages by British seamen, unless there would be a complete failure of justice in consequence. He holds that redress must be sought in the usual manner through the consular officer. The result has been to put a stop to the numerous blackmailing suits that have hitherto caused much annoyance and expense to ships in these ports, and which were generally instigated by crimps on the assumption that in most cases the masters would rather settle an unjust claim than be put to the delay and expense of defending themselves. For many years I endeavoured to get Judge Bellinger's predecessor on the Bench to take this course, but without success.

The number and changes in crews of British ships entering this port during the last year have been as under:—

	Number.
Total number of crews	1,677
Deserted	191
Discharged	84
Engaged	187
Reported dead	5
Hospital permits	27

Pilotage.

From all I can learn the pilot service has been fairly good. The legal rates of pilotage are:—

Rates.

Across the Columbia Bar to Astoria, 5 dol. per foot of draft and 2 c. per register ton. From Astoria to Portland, 2 dol. per foot of draft and 2 c. per register ton.

The outward rates are the same.

Towage.

I have not heard much complaint of the towage service last year. The latest schedule is as follows:—

Rates.

Towage from the Pacific Ocean across the Bar, or Astoria to Portland and return, for the round tow:—

Tons Register.		Amount.
Over—	To—	
		Dollars.
500	700	500
700	1,000	550
1,000	1,200	600
1,200	1,500	650
1,500	1,800	700
1,800	2,000	750
2,000	2,500	800

Tug's hawser, when used, 15 dol. each way.

No lighterage now necessary.

I would call attention to the fact that since the practical completion of the Port of Portland works, on the rivers between Portland and the sea, no vessels have found it necessary to lighter cargo.

Aids to navigation. Lightship moved,

The lightship off the mouth of the Columbia River was moved about June 10, 3 miles S.E. ¼ E. of her former station, into 180 feet at low water. Her geographical position, as taken from chart No. 6149 of United States Coast and Geodetic Survey, is:—

Latitude, north, 46° 10′ 30″; longitude, west, 124° 11′ 15″.

Bearings and distances as taken from same chart:—

Cape Disappointment Lighthouse, N. by E. ½ E., 8¼ miles; Point Adams Lighthouse, N.E. by E. ½ E., 8¾ miles; Tillamook Rock Lighthouse, S.E. ¼ E., 16 miles.

Columbia bar whistling buoy moved.

The Columbia River outer bar Whistling Buoy was moved

about July 10, into 90 feet at low water, about 3½ miles north-easterly from its former position. Bearings and distances, as taken from chart No. 6140 of the United States Coast and Geodetic Survey, are:—

Cape Disappointment Lighthouse, N.E. ⅛ E., 4⅞ miles; outer end of jetty, E.N.E. ⅞ E., 5¼ miles; Point Adams Lighthouse, E., 8⅜ miles; Columbia River Light-vessel, No. 50, S. ¾ E., 4⅜ miles nearly.

Trade and Commerce.

The exports and imports for the last 2 years are shown in the following tables:—

Annex B.—RETURN of Principal Articles of Export from Portland, Oregon, during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Wheat	Quarters	660,596	697,070	629,367	887,368
,, flour	Sacks	251,626	222,327	265,985	302,438
Timber	Feet	2,027,000	4,744	2,693,000	4,760
Tinned salmon	Lbs.	...	...	178,992	3,386
Barley	Bushels	13,110	1,730	...	...
Cascara bark	Lbs.	56,043	504	...	..
Other articles	...	...	7,548	...	10,148
Total	...	...	933,923	...	1,208,100

RETURN of Principal Articles of Import to Portland, Oregon, during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Coals and coke	Tons	11,672	6,404	19,270	13,495
Tin and terne-plates	Lbs.	2,167,891	12,248	1,986,897	12,020
Rice	,,	2,134,923	7,393	5,698,842	23,398
Earthenware and glass	...	...	11,146	...	15,682
Salt	Lbs.	5,643,243	3,593	7,024,136	4,182
Cement	Barrels	73,395	18,949	54,608	11,197
Tea	Lbs.	290,521	9,238	493,916	15,611
Hemp and jute	Tons	1,308	31,150	1,908	27,825
Window glass	Lbs.	481,962	1,991	2,962,490	10,165
Bags and bagging	...	...	11,479	...	37,568
Sugar	Lbs.	2,129,551	16,595	1,397,544	10,625
Coffee	,,	101,231	4,498	80,965	3,232
All other articles	...	...	59,095	72,382	72,382
Total	...	...	193,779	...	257,382
Entered for transportation to other districts	...	...	491	...	36,648
Grand total	...	...	194,270	...	294,031

NOTE.—The above returns do not include exports or imports coastwise or by rail, with the exception of articles transported in bond.

Decreased value in both exports and imports.

The total value of exports to foreign countries and coastwise was 30 per cent. less than in 1892. The value of all produce shipped by sea to domestic ports was 631,156*l.*, against 790,560*l.* last year.

The falling-off in imports from foreign countries was 99,761*l.*, a little over a third, and there was a similar decrease in imports viâ San Francisco and from the Eastern States.

Wheat.

The exports of wheat were greater in quantity but smaller in value than during 1892, and the quality was also generally inferior. The shipments viâ San Francisco were 132,158 qrs., and the total shipments, foreign and coastwise, were 943,539 qrs., valued at 940,386*l.*, an average of 19*s.* 11*d.* per quarter, as against 1*l.* 8*s.* last year. The decline has been steady during the year. Oregon valley being quotable 1*l.* 3*s.* 6*d.* f.o.b. per quarter in January, and 17*s.* 6*d.* in December. Walla Walla at 1*l.* 1*s.* 6*d.* and 15*s.* 8*d.* respectively.

Flour.

A larger quantity of flour was shipped to China and Japan than last year, the exports being equal to 79,048 sacks of 280 lbs. The total shipments, foreign and coastwise, were 410,770 sacks valued at 372,619*l.*, an increase in quantity but a very considerable decrease in value. The average value f.o.b. per sack was apparently about 18*s.* 2*d.*, while in 1892 it was 1*l.* 2*s.* 6*d.* At the beginning of the year roller extras were quotable at 19*s.* 8*d.* per sack, and superfines, 14*s.* 3*d.*, while at the close prices were 15*s.* 6*d.* and 12*s.* 10*d.* respectively.

There was a lessened production and consequent falling-off in shipments of oats, barley, flax-seed, and other cereals. Prices of

Barley.

barley were much lower than last year, and this, and low freights, permitted of export of a part cargo to the United Kingdom.

Oats

Prices of oats were high at the beginning of the year and steadily advanced till June, from which time they receded, but the average for the year was high.

Flaxseed.

The year opened with high prices for flax-seed. In March they declined until November, when an advance was established, and in December the highest prices of the year were attained. There is a steady consumption by a local oil-mill.

Wool trade demoralised.

The wool trade is very much demoralised. This is generally attributed to the existing uncertainty in the matter of tariff. Prices have sunk to a very low point; in May, when the season opened, Eastern Oregon wool was quoted here at 7¼*d.* (14½ c.), Willamette Valley wool at 7⅜*d.* (15¼ c.), and in August, Umpqua Valley wool at 7½*d.* (15 c.). In December these wools were quoted at 3½*d.* (7 c.), 5½*d.* (11 c.), and 6*d.* (12 c.) respectively. These extremely low prices, which are of course for unwashed wools, are ruinous to the trade.

Hop trade.

The crop of Oregon hops was about 38,500 bales of 185 lbs. each, and quality was generally good. Few yards were affected by the louse, and great care has been taken in spraying the vines wherever it appeared. Prices were fairly steady, averaging about 7½*d.* (15 c.) per lb., and growers made money.

Fruit trade.

Small fruits were abundant and cheap during the season, but

the larger fruits, such as apples, pears, prunes, although plentiful, sold at high prices. Much attention is now being given to orchards, and the fruit trade seems to have been generally profitable during the year.

Timber trade.

Shipments were larger than for several years, but the trade has been far from profitable. Shipments coastwise, by sea, were 33,313,000 feet sawn timber valued at 65,664*l.*, and 13,385,000 laths valued at 4,698*l.* Barrel staves to the value of 6,598*l.* were also shipped. The foreign trade, always small, has been less than usual.

Fisheries: Salmon pack.

The salmon pack of the Columbia River was 417,600 cases, and of other bays and rivers in Oregon, 49,800 cases. Shipments to England were 11,728 cases; to San Francisco, 106,575 cases.

Shipments.

I am unable to give the shipments by rail eastwards, as owing to jealousies of the companies these have not been so far published. The average market prices were about the same as last year, 5*s.* 3*d.* for tall tins and 6*s.* for flat tins per dozen 1-lbs. f.o.b.

Import trade.

The bulk of the import trade has, as usual, been done by sail and rail from the Eastern States and from San Francisco. Owing to the jealousies of the railroad companies it is difficult to procure reliable figures of this trade.

The records of the custom-house show a decrease in imports of nearly all staple articles except tin-plates, cement, sugar, and coffee.

Window glass.

Belgium seems to monopolise the trade in window glass, 80 per cent. of which was imported from thence.

Cement.

Of the cement but 18 per cent. was received from Belgium last year, but the Belgian product is gaining in favour, and has been so well reported upon that the proportion will undoubtedly be greater next year. Prices were low, the average for standard brands of English cement having been about 9*s.* 6*d.* per barrel. Unknown and inferior brands sold very much lower, some as low as 8*s.*, at which there could only be a heavy loss to the importer. Stocks are heavy but there will be a large consumption during 1894 for public works.

Coals.

Imports of foreign coal were very small, viz., 8,298 tons from Australia, 1,260 tons from United Kingdom, and 1,371 tons from British Columbia. Receipts from coast mines and by rail were about 64,600 tons. Prices were low and Australian sold at about 1*l.* 3*s.* duty paid. The plentiful supply of wood here for fuel militates against the consumption.

Tin-plates.

Receipts of tin-plates were larger than last year. Market prices have been declining all the year, and there is little profit in the business. B.V. grades of coke on an average sold at 1*l.* 3*s.* 4*d.* per box. This price is higher than the average of open market would be, as a large proportion of the plates delivered last year were sold to arrive at higher prices than could have been procured after arrival.

Iron.

Imports of iron were very small, and the few hundred tons of pigs imported sold with difficulty at losing prices. The demand was principally supplied from local manufacture.

Bags and bagging.

The consumption of bags and bagging was above the average. The market is principally supplied from Calcutta, but a large proportion of the demand is supplied with goods which are cleared in the San Francisco custom-house, and do not, therefore, appear in the tables accompanying this report. Market prices for standard, 22 by 36, bags were steady at about an average of $3\frac{1}{8}d.$ ($6\frac{1}{4}$ c.).

Hemp and jute.

From the tables it will be noted that there is quite a large trade in raw hemp and jute which is used in the extensive rope manufactory. This is imported from Manila by the Canadian Pacific line of steamers to Vancouver, B.C., or by the Northern Pacific line to Tacoma. Trans-shipment is made at Hong-Kong or Yokohama.

The following table shows the value of all exports and imports by countries:—

Annex C.—TABLE showing Total Value of all Articles Exported from and Imported to Portland, Oregon, from and to Foreign Countries during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	845,875	1,026,451	67,197	60,736
Belgium	..	48,270	10,339	17,235
British Columbia ..	18,412	18,320	6,694	8,534
China and Japan ..	56,136	95,534	48,477	87,034
" " in transit	..	..	..	36,649
Australia	..	..	4,351	10,031
Peru and Chile ..	..	2,380	..	..
France	13,500	..	1,560	1,205
Cuba	..	..	2,743	4,331
Philippine Islands ..	..	..	24,954	17,937
India	..	45	20,122	42,476
Germany	..	17,100	2,456	4,804
Italy	..	..	..	[illegible]
All other countries ..	..	..	5,377	1,834
Total	933,923	1,208,100	194,270	294,031

Financial: Failures of banks.

The failures of banks throughout the State were six National, five State, and nine savings and private banks, with total liabilities of 1,475,650*l.* In this city the general depression throughout the country caused the suspension of seven banks and financial institutions, four of these were National banks, but three have resumed business.

Commercial.

The commercial failures in Oregon during the last 3 years were:—

Year.	Number of Failures.	Liabilities.
		£
1893	221	391,420
1892	215	323,020
1891	157	135,920

For a time money was not to be had on any collateral, and although the money market is still very stringent and likely to remain so for some time to come, reasonable facilities are now given for the usual business purposes. Transactions of the clearing-house for the last 4 years were as under:— Clearing-house.

	Amount.			
	1893.	1892.	1891.	1890.
	£	£	£	£
Exchanges	15,312,951	21,900,719	20,515,433	18,687,845
Balances	3,031,088	4,334,711	3,949,883	3,557,015

During the year 30-year 5 per cent. bonds were issued and sold as under:— Bonds.

Water bonds, 30,000*l.* at par, and 60,000*l.* at 2½ per cent. premium; City Hall bonds, 66,000*l.* at 4·522 per cent. premium; Bridge bonds, 59,200*l.* at par; and Ferry bonds, 10,000*l.* at 3·394 per cent. premium. Exchange varied between 4 dol. 78 c. and 4 dol. 86 c. for Bank. Exchange.

Population and Industries—Health.

Fewer new buildings have been built during the year than for many years past, as money was not easily obtainable for the purpose. Only 517 permits were issued from the office of the street superintendent. Estimated value of buildings erected 433,856*l.*, against 1,170 permits and 917,000*l.* in 1892. Expenditure on new City Hall, 47,777*l.* Buildings.

Foundries, saw mills, oil works, rope works, and workshops generally, which employ a great many hands, have been very slack, and rigid economy has been practised in all departments. Manufactories.

The furnaces of the Oregon Iron and Steel Company were not in blast over one-third of the year, and the product of pig-iron was 4,739 tons. The company's cast-iron pipe works were run steadily on orders for the new waterworks, and the product was 4,263 tons. Ironworks.

The rolling mills were closed most of the year.

Nearly all the Cœur D'Alene mines have been forced to close on account of the low ruling prices for silver and lead, and being Mining: Silver.

all what is known as low grade mines will doubtless remain closed unless there should be an improvement in this respect, or miners agree to work for lower wages. Much attention is being given to the development of gold properties. Official figures of production in Oregon during the year are 328,830*l.*, an increase of 31,989*l.* over 1892. At the present rate of development there is likely to be a notable increase of production. Wells, Fargo, and Company give the shipments of the precious metals from Oregon during 1892 as, gold, 230,395*l.*, and silver, 22,332*l.*

Gold.

Shipments.

Labour.

Owing to the small amount of building done and the general unprofitableness of business, skilled labour has not been in such demand throughout the year. Considerable numbers found employment at the Government work at the Cascades Locks and on the new waterworks, reservoir, &c., yet there has been a good deal of genuine distress amongst the labouring classes. A great many clerks, salesmen, and others in general business have also been thrown out of employment through the economy necessarily practised, and I would more than ever warn such against coming here expecting to find employment promptly.

Health.

The health of this city has been very good during the past year, and there have been no epidemics. At one time very little attention was given to the hygienic condition of the city, but this has been improved under the efficient administration of the present city physician.

The records of the health officer unfortunately are not kept with any great degree of accuracy as to classification of disease, but the highest percentage of deaths seems to have been from pulmonary diseases, largely constitutional. Nearly all the Chinese are reported as dying of consumption and kindred diseases, which accounts for the high percentage. Next in order follow diseases of the heart and brain and zymotic diseases.

Death rate.

The total number of deaths reported were 1,054, including 73 still-births. On an estimated population of 80,000 this is 13·17 per 1,000.

Public Works.

Railways.

Although some extensions to existing lines of railway are under consideration, there has been no actual construction in my district during the past year. An extra rail has been laid throughout most of the Oregonian Railway system (narrow gauge) rendering it available for trains of the usual standard gauge.

Waterworks.

Extensive work has been done on the new waterworks commenced some time ago, with the object of bringing in a magnificent supply of pure water, by gravitation, from Bull Run, 33 miles away. The expenditure on extensions and the new system during the year was 105,554*l.*

Bridge.

The new steel bridge referred to in my report of last year has been nearly completed and will be open to the public in a few months' time. There has been expended during the year on this, 46,734*l.*

Improvement of the Columbia and Willamette Rivers has been continued by the United States Government and the Port of Portland Commission under the supervision of Major Handbury, United States engineer in charge. Government works.

At the mouth of the Columbia there has been no further extension of the jetty tramway, which is 4¼ miles long, and has reached the length proposed. About 50,000*l.* was expended during the year; a large quantity of rock having been placed in position. The total amount appropriated by Congress for this project since its inception is 337,500*l.*, and the engineers estimate 67,636*l.* additional will complete it. A board of engineers decided under date May 27, 1893, that, when finished, the level of the top of the jetty at the shore end shall be 12 feet above the mean low water plane; from thence, for a distance of about 2 miles, it will slope to a height of 10 feet, and from thence to the end of the jetty to a height of 4 feet. There will be four low tide groins on the north side of the jetty, two of 1,000 feet in length, one of 600 feet, and one of 500 feet. The latest survey shows that so far the effect of the jetty has been to close all other channels, and that the channel has a depth of 30 feet and over at mean low tide, ⅜ of a mile wide, and 27 feet contours 1 mile wide, with 24 feet contours 2 miles wide. Some damage was done by heavy storms during the winter to the jetty tramway. Mouth of Columbia: Jetty.

A dam of 2,900 feet in length of piles, brush, and rock has been built in the Columbia River, opposite the Government military post at Vancouver, Washington. On this 6,200*l.* has been spent, its object being to give 20 feet of water across a sand bar which had but 9 feet at low water. It is not yet ascertained whether this object has been attained, but if so, vessels drawing 20 feet will be able to ascend the Columbia to Vancouver. River bars. Vancouver.

From Portland to Astoria navigation is by 12 miles on the Willamette River, and 98 miles on the Columbia. Improvements were commenced in 1877 when the low water depth of channel at the shoalest parts was between 10 and 15 feet. It is now not less than 20 feet at low water at all points except two in the lower reach of the Columbia River where it is 19 feet with an average rise of tide of 7 feet. A new dredger was built by the United States Government at a cost of 13,200*l.*, which did a large amount of work during the year. The estimates now contemplate a depth of 25 feet all the way from Portland to the sea. The Port of Portland Commission finished the dykes at Walker's Island and Snag Island in the Columbia during the year, and during the past 2 years has built 43,000 feet of dykes, and has dredged during the year 87,150 cubic yards at Swan Island and Post Office Bars on the Willamette and at St. Helen's and Martin's Island in the Columbia, expending in all 76,221*l.* This work was done under the superintendence of Major Handbury, United States engineer, who also expended on account of the United States Government 33,000*l.* in dykes at St. Helen's and Martin Island, and in dredging at Swan Island Bar, where 45,887 cubic yards of material were removed, and the channel widened to 150 feet, and to a Lower Columbia and Willamette. Work on 25-ft. channel by Port of Portland Commission and the United States engineers.

depth of 22 feet at low water. Since 1866 the United States Government has expended 206,073*l.* in these works, and the engineers estimate 32,000*l.* more will complete the project, which is to maintain a low water channel, having a depth of 25 feet, and which they believe will be shortly accomplished through the works now nearly completed.

Upper Willamette and minor streams.

About 3,500*l.* was expended during the year in clearing the channels of the Upper Willamette and navigable streams tributary, which are navigated by light draft steamers.

The following works are in charge of Captain T. W. Symons:—

Minor harbours: Yaquina.

Yaquina Bay has been under improvement since 1881, by the construction of a jetty on each side of the entrance north and south. The amount expended so far is 120,170*l.*, and it is estimated 30,860*l.* more will be required to complete the project. The results are that where there was 7 to 8 feet depth over the bar at low water, there is now 14 feet. An inner bar, however, has arisen 2,000 feet inside the entrance.

Coos Bay.

The project for improvement of Coos Bay is to build two high tide stone jetties, one from Coos Head, and one from the south end of the north spit toward the bar, leaving an entrance of 1,500 feet wide. The estimated cost is 493,300*l.* The north jetty has been built to a length of 4,800 feet, and there is now 18 to 21 feet of water at low tide in the entrance channel. A minimum depth of 12 feet at low water has been maintained over the bar. Mean rise of tide 5·6 feet. 84,956*l.* has been expended on this work since 1879.

Siuslaw. Willapa. Gray's harbour.

Jetties are also in course of construction at the mouth of the Siuslaw River, in Southern Oregon, and at Willapa Harbour, formerly known as Shoalwater Bay, and at Gray's Harbour, north of the Columbia River in Washington.

Coquille, Umpqua, &c.

Some work has been done with a view of improving the entrances to the Coquille River, Umpqua River, Nehalem and Tillamook Bays, but the results have little of interest except locally.

Quite a large amount has been expended at different times for the improvement of internal navigation on the Upper Columbia and Upper Snake Rivers, and with very good results.

Cascades canal.

Under the superintendence of Lieutenant Taylor work has been steadily prosecuted on the Government canal and locks at the Cascades of the Columbia River. The contractors have employed a large force of men in quarrying stone, hewing and putting it in place. 247,930*l.* has been appropriated by Congress for the completion of this work, on which 375,116*l.* had been expended up to June 30, 1893.

Agriculture.

Farming very unprofitable.

The past year was probably the most unprofitable one that farmers have ever experienced in this State, only fruits and hops

having been profitable. Although crops were heavy, late and long continued rains during harvest caused a large amount of damage. In some sections of Eastern Oregon and Washington only a small proportion of the wheat crops were saved. This and the fearfully low prices realised for sound wheat ruined a great many farmers. Statistics and prices of wheat are given under another head in this report.

Oats. During the months of March to June, prices of oats were very high, going to 6*s.* (1 dol. 50 c.) per cental, but the average for the year was 4*s.* 7*d.* (1 dol. 16 c.) for choice. Shipments coastwise were 42,036 centals.

Barley. Prices of barley were very low, averaging only 3*s.* 8*d.* (90 c.) per cental. Shipments coastwise were only 26,956 centals.

Flax-seed. Average market prices for flax-seed were 7*s.* 9*d.* (1 dol. 95 c.) per cental, and there was a good demand to supply the linseed-oil works. The shipments coastwise were 714,294 centals.

Potatoes. Potatoes were an average crop, but quality was below average.

The market prices, although low, were not so unremunerative to the farmer as wheat. Average price 4*s.* 2½*d.* (1 dol. 5 c.). In June there was a scarcity, and they sold as high as 8*s.* 7½*d.* (2 dol. 15 c.) per cental.

Onions. The crop of onions was damaged to some extent by rain, entailing heavy losses to growers. Prices were generally good. Ordinarily onion-growing is quite profitable in suitable localities. On beaver dam lands the yield is enormous.

Hops, cost of growing. The acreage under hops is steadily increasing, and a large number of new yards will be in bearing next year. It is said to cost 4*d.* (8 c.) per lb. to grow and harvest them, and it is estimated Oregon will produce 50,000 bales in 1894, should the season prove favourable.

Orchards, large yield of fruits. In view of the ruinous prices received for wheat there is a tendency to grow more largely such fruits as apples, pears, prunes, &c., which will bear transportation, and for which there is a steady demand. The yield of apples, pears, and prunes was heavy, but the peach crop was short on account of late frosts. Apples and pears were more free of moths than for some time past, and sold at full and profitable prices for the Eastern States. Prunes sold low. There was an over-production of small fruits which Small fruits. could only be sold locally, and in consequence much was wasted.

Cattle and Sheep.

The official figures of the number of domestic animals in Oregon are as under:—

Description.	Number.
Horses	235,607
Mules	6,182
Cows	110,398
Other cattle	804,543
Sheep	2,529,759
Swine	210,747

Horses. There was a very poor market for horses, and good graded animals were sold at very low prices. In consequence, numbers of breeders are going out of the business. There is hardly any demand now for horses for street cars, as electricity has superseded them. There is more demand for good, heavy draft horses, than for any other class.

Cattle. During the first half of the year fair prices were paid for beef cattle on the ranges, but they sold much lower in the last Prices. months of the year. The Union Meat Company, which has a wonderfully complete establishment here and at Troutdale a few miles distant, bought and slaughtered about 20,000 cattle at an average price for the year of 6*l.* 12*s.* (33 dol.), which would be about 4*l.* on the ranges. The same company slaughtered about 6,000 calves at an average price of 1*l.* 10*s.* (7½ dol.). There was Swine. more profit in swine, and there will be a large increase in their products, as a large amount of water-damaged wheat at a low cost was available for feeding, and upon this they rapidly grow fat. The Union Meat Company slaughtered 15,000 at an average cost Sheep. of 2*l.* 4*s.* The year was a most unprofitable one for sheep owners as prices of wool were ruinously low. I doubt if there was any money in mutton either. There were 70,000 sheep slaughtered by the Union Meat Company which cost on an average for the year 9*s.* (2 dol. 75 c.) per head. At the close of the year, sheep could be bought on the ranges at 6*s.*

General Remarks.

The State legislature, which met in January, 1893, abolished the right to deduct indebtedness from property listed for taxation, and repealed the law taxing mortgages. The result is, that although values are much lower the net valuation of all property Assessment: total value. assessed in this city was 10,866,500*l.*, against 9,086,465*l.* last year.

Rate of taxation. The State and county taxes were levied at the rate of 1·38 per cent., city tax at ·87 per cent., district school tax at ·10 per cent., and Port of Portland tax at ·025 per cent. In all, 2·375 per cent., payable in 1894.

Sewers and streets. In 1893, 15·13 miles of sewers were constructed, making a total of 76·48 miles within the city limits. Only 10 miles of streets were laid out and improved during the year, making a total of 168·24 miles in all. Trinidad asphalt seems to be the favourite paving material, but while there has been some improvement during the year the pavements are in a disgraceful condition for a place of the size and pretensions of Portland.

City finances. The total revenue of the city, including balances carried over from 1892, was 158,228*l.* Of this the sum of 34,276*l.* was derived from licenses. The total expenditures were 133,335*l.* In addition to the above the following expenditure was collected from owners of contiguous property:—Street improvements, 37,226*l.*; street extensions, 6,455*l.*; sewers, 43,251*l.* The expenses of the Fire

and Police Departments included in the above were 30,111*l.* and 23,848*l.* respectively.

The income from the present waterworks for the year was 45,770*l.*, and the disbursements of the operating department, 12,223*l.* Interest paid on water bonds, 10,750*l.* Revenue from water.

The revenue and expenditure of water, bridge, and Port of Portland Commissions are not included in the foregoing figures.

The bonded indebtedness of consolidated city inclusive of water bonds is 105,300*l.* 6 per cents. and 441,000*l.* 5 per cents. Bonded debt.

As British Insurance Companies are very largely interested in the matter of fire protection, I think it well to add a short description of the Fire Department. Fire Department.

The city is very well protected with one exception, there being urgent necessity for a fireboat to protect the water front. The strength of the Department is 176 men and 55 horses, divided into 8 engine, 4 hose, 5 hook and ladder, and 2 chemical engine companies. These are supplied with 3 second class, 1 third class, 3 fourth class, and 1 fifth class steam engines, each with tenders and an average of 800 feet of hose, 2 chemical engines, each with 250 feet of hose. The hose companies are each equipped with a four-wheeled hose cart, and an average of 850 feet of hose. The hook and ladder companies are equipped with 1 first class, 1 second class, and 3 third class Hayes trucks. The city is supplied with 488 hydrants and 82 fire cisterns, and a very complete fire alarm telegraph with 101 boxes.

Owing to the prevailing business depression in general trade, real estate has been dealt in but sparingly, and the transfers and sales recorded in Multnomah county were smaller than for many years past. The total value recorded was 6,585,710 dol., equal to 1,317,142*l.*, which is less than half of the amount recorded in 1892. Rea estate.

NOTE.—All values in this report are reduced to sterling at the exchange of 5 dol. to the 1*l.*

ASTORIA, OREGON.

Mr. Vice-Consul Cherry reports as follows:—

General Remarks.

The trade of the district has been adversely acted on by the sudden financial troubles of last summer, but not to nearly the same extent as other towns in Oregon and Washington. The reports coming in of destitution in larger and usually more prosperous towns of Oregon and Washington cannot be said of this town, which so far has had no cases of destitution. However, business has been a great deal worse off than for the year 1892.

Shipping and Navigation.

There is a decided falling-off in the number of vessels arriving in the Columbia River, which, however, has been partly made up by the increased size of the vessels. Those under the British flag keep their proportion as to numbers, and with a better proportion in tonnage. The deepening of the Columbia River above this has been marked, but exactly how much the gain has been cannot be accurately determined, as owing to the unusually early and heavy rains the rivers have been higher than usual. This fact, with the improvement of the Columbia River by the admirable work on the jetty at its mouth, has resulted in so much deeper water as to draw a far larger class of vessels to this river.

Pilotage charges.

Pilotage charges were, however, raised over 25 per cent. by the legislature of the State of Oregon during its session last winter; the new rates being 1*l.* (5 dol.) per foot, and 1*d.* (2 c.) per ton measurement on the total tonnage. However the pilots with their schooner and in conjunction with the two tug-boats have given good service, but the insertion of the clause in the pilot bill debarring any owner or employé of any steam-tug from acting as a pilot prevents anything like serious competition.

But during the last part of the year some pilots from the neighbouring State of Washington entered the field with, I think, beneficial results while the competition lasted.

There were no disasters of any moment to shipping in this district for the past year. The lightship has been moved about 3¼ miles south-east half south from her former position, this has been done for the double purpose of making a better position for vessels waiting for daylight to enter, and also to keep the vessel out of the constant tide rip formed by the river current meeting the incoming seas.

Seamen.

The former troubles with regard to seamen have been abolished, nearly all the engagements have been made without the intervention of boarding masters. I append a statement of crews and changes during 1893 :—

	Number
Total number of crews	1,642
Deserted	56
Discharged	6
Engaged	113
Reported dead	3
Hospital permits	5

The following table shows the number and nationalities of vessels entering and clearing during the past year :—

Annex A.—RETURN of all Shipping at the Port of Astoria, Oregon, during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	62	93,752	6	2,567	68	96,319
American, coasting	63	40,208	391	322,274	454	362,482
,, foreign	4	1,930	13	7,505	17	9,435
Norwegian	1	1,518	...	...	1	1,518
German	1	826	...	...	1	826
Total	131	138,234	410	332,346	541	470,580
,, for the year preceding ...	156	160,403	369	260,092	525	420,445

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	44	66,339	1	561	45	66,900
American, coasting	330	315,562	54	37,269	384	352,831
,, foreign	18	6,833	5	8,172	23	15,005
Total	392	388,734	60	46,001	452	434,736
,, for the year preceding ...	430	357,897	95	56,526	525	417,423

Trade and Commerce.

The following tables show the exports and imports for the past two years :—

Annex B.—RETURN of Principal Articles of Export from Astoria, Oregon, during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Salmon	Cases ..	11,725	13,880	78,995	93,698
Wheat	Bushels ..	64,688	10,248	407,758	76,611
Flour	..	..	..	1,485	1,462
Lumber	M. feet ..	592	1,153	5,879	13,804
Sundries	..	..	956	..	327
Total	..	..	26,237	..	185,902

RETURN of Principal Articles of Import from Astoria, Oregon, during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value
			£		£
Tin-plates	Boxes ..	40,739	24,548	38,734	24,923
Coal	Tons ..	2,781	1,623	2,682	1,571
Sundries	..	..	1,460	..	567
Total	..	..	27,631	..	27,061

The falling-off in the returns are owing to the smaller pack of canned salmon in this district and the excessive competition of every immediate seaport, together with the want of communication by railway with the interior.

Financial matters. The financial storm of last summer visited this district, and resulted in the temporary suspension of one of the four banks, and latterly has cramped business to a great extent.

Exports. Exports have fallen off in wheat and flour, owing to the deeper river above and the smaller amount of shipping, and also in the great stagnation in the timber trade.

Imports show a slight increase over the past year, this has been all in canning supplies.

Population. The population of the town is about 9,000, but owing to the lack of communication except by river steamer industries depending on unbroken carriage are stifled, and this prevents any growth of the town population. The surrounding country, however, is making additions although very much hampered by the dense forest.

Industries. Salmon fishing still holds the chief place, the catch for the canneries was smaller than the year before, but it is reported that a far larger quantity of fresh frozen salmon was sent by rail to the cities east of the Mississippi River than for the year previous. The World's Fair at Chicago would make a large demand, but the demand for fresh salmon is evidently increasing. The fish averaged a larger size than usual, the price paid by the canneries was 5 c. (equal 2½*d.*) per lb. undressed, which would equal 1 dol. 20 c. (equal 5*s.*) per fish.

In the matter of combination fishermen still hold their own against the purchasers the cannerymen, who so far cannot come to any understanding although efforts are still made to combine all the canneries in a stock company for the enhancement of prices and reduction of expenses.

Salmon canning The preserving of salmon was behind that of last year, cannerymen complain what with the high price paid for the raw material and the depressed state of the market for their goods, the margin in their favour is exceedingly small, the prices realised

were from 1 dol. 35 c. to 1 dol. 45 c. per dozen cans for 1-lb. talls, equal to 5*s.* 10*d.*, 1 dol. 50 c. to 1 dol. 55 c. per dozen cans for 1-lb. flats, equal to 6*s.* 3*d.* and 6*s.* 6*d.*; only a small quantity, 11,725 cases went directly to Great Britain, another lot going to San Francisco to be shipped thence, amounting to 700*l.* how much more went in that way it is impossible to find out. The greater portion, however, goes by rail to the inland cities of the United States.

The total pack was:— Salmon pack.

	Quantity.
	Cases.
Spring salmon	415,000
Fall salmon	30,000
Packed north of this	36,000
„ south „	50,000
Total	531,000

This industry has the same complaint to make, i.e., a great falling off, but the weekly pay of the fishermen is quite a sum, the price paid is 3 c. ($1\frac{1}{2}d.$) per lb. for the gross weight, practically the whole catch is sent to the Atlantic seaboard, excepting the isinglass, which is to a great extent prepared by the Chinese and by them shipped to China. Sturgeon fishing.

This industry is directly affected by the market for lumber and has been very much depressed indeed during the past season, by the falling off of orders mostly from California ports. At Coos Bay, a small port on the Oregon coast, a large raft of logs was constructed for the San Francisco saw mills, after various accidents at starting the raft was taken to sea, but unfortunately meeting with extremely heavy weather it was broken up, becoming a total loss, the drifting logs have been a menace to coast navigation. The time of the year chosen to tow the raft was a poor one, being mid-winter, in the future, I believe, that the raft will be held till the summer and autumn, as giving the best opportunity for smooth weather at sea. Logging.

Only two vessels left here for long voyages, one to New York with fine spruce lumber which brought excellent prices, and the other to Hong-Kong, sent by a Chinese firm. The falling off in the demand has had the effect of shutting down the three mills in the town since November. The total output was a great deal less than last year, and for the coming year the outlook is not encouraging. Sawing lumber.

The can-making establishment reports very favourably of the output of made cans for the salmon packing industry in the immediate vicinity, and for the fruit packing industry in the interior. The number of cans made comes to nearly 8,000,000, all the tin-plate was imported from Great Britain either directly by sail or through San Francisco, both by sail around the Horn Can-making.

or by steamer to New Orleans and thence by rail and steamer to Astoria.

Leather-making

The local tannery reports a very much larger output, which, however, all goes to San Francisco. The leather is of a superior grade and received a medal from the jury of awards at the late World's Fair in Chicago. This was, however, credited to the San Francisco house who exhibited the goods as of Californian make.

Tannin extract.

Tannin extract at South Bend continues to be successfully made in largely increasing quantities, the output last year was over 8,000 barrels, and the factory is largely behind its orders from east of the Rocky Mountains, I am informed that the quality is very superior and rich in tannin, being made from hemlock bark.

Wood-pulp.

This industry is also one that has not been affected by the depressed times, all the product of the mills goes to San Francisco, and amounts to nearly 5,000 tons per annum, the pulp is entirely made from spruce wood. That wood giving a lighter coloured pulp than from most woods. This mill was also in receipt of a medal from the World's Fair in Chicago.

The following table shows the value of all exports and imports.

Annex C.—TABLE showing Total Value of all Articles Exported from and Imported to the Port of Astoria, Oregon, from and to Foreign Countries during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	23,052	161,350	24,584	27,500
British colonies ..	136	2,060	1,623	1,561
Other countries ..	3,050	23,205	1,460	590
Total	26,238	186,615	27,667	29,651

Agriculture.

Potato and hay crops.

But little can be said for the district. I am informed that the two principal crops, potatoes and hay, were very abundant. Potatoes cannot be sold as they will barely pay the cost of transportation. Hay has, however, brought good prices, averaging 14 dol. (equal 2*l.* 16*s.*) per ton, and producing 2½ tons per acre.

Apple crop

The apple crop was abundant and good. Cattle have done well and have brought good prices, but all have been used for local consumption.

TACOMA.

General Remarks.

General remarks relative to the State.

The State of Washington has suffered along with the rest of the country on account of the general depression in business and uneasiness in financial affairs, which has retarded the growth and progress of the State usually made during each year.

Health.

The health of the State has been generally good, there having been no epidemic diseases during the year.

Births and deaths.

The number of births *reported* makes a total of 3,201, while the total number of deaths *reported* was only 1,278, but these records are so very defective that they are of no practical value. A more proper estimate would be births 7,000, and deaths 3,500 for the whole State.

Marriages.

The total number of marriages *reported* was 1,874.

Cattle disease.

It is to be hoped that more accurate records will hereafter be kept. It is to be regretted also that the State officers are still without proper means to dispose of cattle which are incurably diseased and a menace to healthy stock. The cases of glanders in horses in Asotin, Kittitas, Thurston, Pierce, Lewis, and Chehalis counties; tuberculosis in Pierce county; scab in sheep in Klickitat county; the proclamation of the Governor of Montana prohibiting importation of sheep from this State, and communications from the British Vice-Consul and the Commercial Club of Tacoma have each in turn directed attention to this question. The only contagious diseases of animals specifically provided for by the statutes are glanders in horses and scab in sheep, but the law is so weak it is comparatively inoperative. The State Board of Health has received many appeals for help, but its powers are so indefinite that it could do nothing further than send a veterinary surgeon to investigate and report. It has, however, taken cognisance of fatal cases. There were several cases of glanders reported, but only one of tuberculosis and two of scabies. These diseases did not assume epidemic form, and were generally, upon discovery, immediately attended to.

Weather and climate.

The weather conditions that prevailed in the State during the year 1893 were furnished to the central office at Seattle from the monthly reports made by 35 voluntary and 8 regular observers of the Weather Bureau. The chief characteristics were heavier rainfall and colder weather than usual. Western Washington (including the counties west of the Cascades) had a mean annual temperature of 48 degrees, which is 2 degrees colder than normal. The monthly mean temperatures were below the average from 1 degree to 6 degrees every month of the year except January, which was normal, and December, which was 2 degrees above normal. The highest temperature recorded during the year was 98 degrees at Silver Creek, Lewis county, on August 31, while the lowest point reached by the thermometer was 6 degrees below zero at East Sound, January 31. The annual rainfall for this section was 59·37 inches. This is 6·52 inches over and above the normal. April and November

were excessively wet months; the former had an excess of 4·78 inches, and the latter 3 inches. In Eastern Washington (including the counties east of the Cascade Mountains) the mean annual temperature was 46 degrees, that is, 4 degrees lower than the normal. The year was a colder one in this part of the State, for the monthly temperatures were below the average from 2 degrees to 7 degrees from January to November inclusive, December being the only month with a temperature above the normal. On July 31 the thermometer reached its highest point in Eastern Washington, viz., 106 degrees at Bridgeport, Douglas county, while the lowest temperature recorded was 30 degrees below zero at Waterville, Douglas county, on January 31. In this part of the State the monthly rainfall was above the normal from February to June and from September to November inclusive, the remaining months having had less than the average. The annual rainfall was 20·68 inches, which is 4·12 inches above the usual amount for Eastern Washington. The following table gives the average temperature and rainfall and departures from the normal for Eastern and Western Washington for the year ending December, 1893 :—

	Western.		Eastern.		Western.		Eastern.	
	Temperature.	Departures.	Temperature.	Departures.	Rainfall.	Departures.	Rainfall.	Departures.
Year	48	− 2	46	− 4	59·37	+ 6·82	20·68	+ 4·12

	Temperature.	Departures.	Rainfall	Departures.
Total for the State	47	− 3	42·72	+ 4·66

NOTE.—By "departure from normal" is meant difference between values for month or year considered and those for a period of years. (In this case 15 years is taken.) Temperature in degrees Fahr., and rainfall in inches and hundredths. The rainfall has been excessive in all sections during March, April, May, June, and October, and the temperature for each month colder than usual over the entire State. The season has been almost entirely free from hot burning winds that occasionally prevail in the eastern portion of the State during August, the only very warm spell being that from July 28 to August 5, during which the thermometer in some of the eastern counties rose to 102 degrees on several days. The injury resulting to crops from this warm weather was insignificant, and altogether restricted to only a small area.

Industries: Timber.

There was a decrease in the timber product in the Pacific North-west during the year 1893, and a slight decrease in the number of shingles produced. This is accounted for from the

fact that there was less local building done than usual and mill men were compelled to depend almost entirely upon the outside demand which was not sufficient to keep the mills busy. Stagnation still exists in South America and Australia, the great markets for Puget Sound timber, and until the affairs in the former country gets settled but little trade may be expected. Africa is a new buyer in this market; Buenos Ayres and Belgium are comparatively so. The cargo shipments during the year amounted to about 276,876,026 feet of timber. The foreign shipments during the year 1893 were about 80,216,926 feet, the destination being chiefly Chile, the Sandwich Islands, Australia, Mexico, Peru, France, China, and Great Britain. There were shipped 785,000 feet of timber to foreign points from the country adjacent to Gray's Harbour in addition. The foreign shipments during 1892 amounted to 105,002,760 feet. The shipments from Washington to California and coastwise points during 1893 are estimated at 195,874,000 feet. The railway shipments to eastern points amounted to 101,555,512 feet of timber, and 1,289,316,000 shingles, showing an increase over the previous year, 1892, of 905,512 feet of timber and 386,016,000 shingles. Of this amount the Northern Pacific Railway shipped 80,210,000 feet of timber and 967,576,000 shingles, chiefly to Minnesota, Illinois, North Dakota, and Iowa, the latter State being the heaviest shingle buyer. Were lumber rates reduced Iowa should take at least as much timber as it does shingles. But until freight rates are reduced the opening for new saw and shingle mills in the Pacific North-West is not the best. The timber and shingle capacity is largely in excess of the actual product, and until the market is extended there is no pressing need for new mills. In addition the Great Northern Railway shipped 16,590,000 feet of timber and 303,800,000 shingles; the Canadian Pacific Railway shipped 12,740,000 shingles; there was shipped viâ vessel to Portland 5,200,000 shingles, and viâ Union Pacific Railway from the sawmills on the Columbia River 4,755,512 feet of timber, making a total of 101,555,512 feet of timber and 1,289,316,000 shingles. Summarised, shipments of all kinds were:—

Description.		Quantity.	
		1893.	1892.
Timber—			
Foreign	Feet ..	80,216,926	105,002,710
Coastwise	„ ..	195,874,060	263,666,523
Rail	„ ..	101,555,512	100,650,000
Shingles—			
Foreign	Number ..	603,000	7,608,000
Coastwise	„ ..	5,000,000	8,000,000
Rail	„ ..	1,289,316,000	913,300,000

The amount of money brought into the State during 1893 by sale of timber products was:—

Description.	Amount.	
	Sterling.	Currency.
	£	Dollars.
Timber—		
Foreign	361,400	1,807,000
Coastwise	431,322	2,154,614
Rail	300,466	1,502,332
Shingles—		
Foreign	180	904
Coastwise	1,500	7,500
Rail	322,329	1,611,645
Total	1,417,197	7,083,995

Stumpage is worth from 1*s.* to 4*s.* per 1,000 feet and is considered one of the best investments in this State.

The extent of the forest area for the State of Washington is estimated to be 23,585,512 acres of timber having over 410,333,000,000 standing feet, with a stumpage value of about 53,912,000*l.* (269,561,329 dol.).

The largest number of logs taken out during the year in the State, from one county, came from Mason county; Pierce county cut 137,975,769 feet of timber, and King county manufactured over 486,000,000 shingles valued at 132,231*l.* (651,157 dol.).

The selling price of fir logs is from 13*s.* 6*d.* to 26*s.* per 1,000,000 feet, and cedar logs from 18*s.* 6*d.* to 26*s.* per 1,000,000 feet. Rough timber at 40*s.*, and shingles at 5*s.* per thousand.

Freight rates by rail is an average decrease all around of 5*d.*; coastwise cargo prices decreased from 2*s.* to 8*s.*, with an average of 4*s.* per ton.

Railways.

The principal event of the year in railway interests for the State has been the completion across the State from east to west of the Great Northern Railway, opened last February for traffic; Seattle is the present Pacific terminus of this railway; this road from its completion has been getting a good share of the transcontinental as well as the western business, as the line extends its feeders into the agricultural and mineral districts, very gratifying results may be expected, not only for the State, but for the company also. All the transcontinental roads, the Canadian Pacific, the Great Northern, the Northern Pacific, and the Union Pacific, have traffic arrangements now by which passengers and freight can be brought through from eastern points to Puget Sound without changing carriages, a great convenience to the travelling public. Freight rates to and from eastern points have also been considerably reduced, which stimulates the developing of the resources of the State, as well as shipping them to other parts, thus extending trade. There has been very little done in extending branches by the various railway companies during the year, economy being the first thing considered

by all. Most of the roads have got their working expenses reduced to a minimum, by lessening the number of employés and lowering the scale of wages, which happily was acceded to in this State without serious inconveniences or bad results. There are over 2,823 miles of rails laid in the State. The gross earnings of the Oregon Improvement Company, a State railway, for the year 1893 is reported to be 775,549*l.* (3,877,748 dol.) against 778,416*l.* (3,892,083 dol.) for 1892, and the net earnings 144,785*l.* (723,925 dol.) against 152,567*l.* (762,837 dol.) for 1892. Not a very satisfactory showing.

The State has been mercifully preserved from any serious railway accident, although, on account of the heavy rains, serious delays have occurred on many of the lines by washouts, land slips and blockades from the snow storms in the mountain passes.

Mining: Precious metals.

In the Monte Christo district, the company who bought up the mining property have constructed a railway from the mines to Everett, thus giving transportation facilities; a concentrator has been built at the mines and a smelter has been erected at Everett. The bullion going to the refinery at San Francisco. Everything is now ready to commence operations this coming spring.

In the Peshastin district the Blewett Gold Mining and Milling Company have increased their stamp mill to fifty stamps, consequently the product is greatly increased, probably to 100 tons per diem; they claim to make 300*l.* (1,500 dol.) a day profit.

A new country known as the St. Helens district, in the south-west part of the State, has been prospected during the past year and considerable development work done, the results have been on the whole very encouraging.

Coal.

During the past year it has been estimated that there has been mined from the various coal mines in the State 1,071,878 tons (of 2,240 lbs.) of coal, ranging in value, at the mines, from 9*s.* to 12*s.* (from 2 dol. to 3 dol.) per ton, with an average of 10*s.* Another estimate gives 1,211,150 tons for the past year. The Eureka mine at Palmer in King county, on the Northern Pacific Railway, and the Grand Ridge have been opened during the year; the former yielding about 100 tons per diem, being bituminous and of good quality.

Fisheries.

The salmon pack has decreased on the Columbia River for the State of Washington, being 180,000 cases for 1893 as compared with 230,000 cases for 1892. The average price per case being 1*l.* (5 dol.) would make a total of 180,000*l.* (900,000 dol.).

The Puget Sound pack for 1893 was 50,000 cases as compared with 30,000 cases in 1892.

The value of the oyster catch is estimated at 10,000*l.* (50,000 dol.).

The Puget Sound fishing industry for 1893 approximates 600,000*l.* (2,915,000 dol.). This, however, is a very high estimate, probably by one-sixth.

Agriculture.

Owing to the continued rainy weather during the first 3 months of 1893, general farming operations, which in this State usually begin in March, were delayed from 2 to 5 weeks in all counties west of the Cascades and in the north-eastern part of the State. At the time ploughing and seeding were begun the soil was very wet, soggy and cold in all counties in the State, except in portions of the south-eastern counties, where it was comparatively dry. The season opened with a March temperature of 3·4 degrees colder than the average, and a rainfall which, though ·08 inches less than the normal, gave a much larger number of rainy days than is usual this time of year. This excess of moisture was more noticeable in the eastern portion of the State.

Grain, wheat.

As to the effect of these conditions on the crops of 1893, owing to the lateness of spring, the wheat crop, which is by far the most important grown in this State, was not planted in Eastern Washington, north of the Snake River, much before the latter part of May, while in Western and South-Eastern Washington it was all sown by the middle of April. The heavy rain and snowfall of the winter and spring thoroughly saturated the soil with moisture, which having been retained throughout the summer assured a good yield despite the comparatively dry summer weather. The weather during July and August and greater part of September was such that the grain sprouted, grew and thrived in a manner most gratifying to the Eastern Washington farmers and augured well for the merchants of this State, whose prosperity, after all, depends so much on the result of the labours of the farmer. As early as June predictions were freely made that this season's crop would be the largest yet grown, the acreage having been largely increased. By the middle of September all of this had been realised, and the crop was pronounced the largest grown in this State for many years, but the unfortunate farmers whose hopes hinged on the success of their one crop alone were doomed to disappointment, for, on September 28, a rainy season set in and lasted without interruption until October 12. The season being very late, thousands of acres of standing wheat in Whitman, Stevens, Lincoln, Spokane, and Douglas counties were knocked down and greatly injured, while acres upon acres of grain in stack were completely ruined. The loss in these counties alone from this unprecendented and unusual downpour of rain has been variously estimated at from 2,000,000 to 3,000,000 bushels. The total acreage sown in Whitman county was 450,000 acres, of which there were 400,000 acres in wheat, yielding 20 bushels per acre; leaving 50,000 acres sown in barley and oats, which yielded from 50 to 60 bushels per acre in barley and 40 bushels per acre in oats; from this amount only three-tenths was saved of marketable wheat and very little barley and oats.

The total acreage sown in Lincoln county was 170,000, of which nine-tenths was in wheat, the rest barley and oats. The average yield for wheat being from 21½ to 22 bushels, for barley

50 to 60 bushels, and for oats 40 to 50 bushels per acre. The yield of cereals was about 5,000,000 bushels, and possibly not more than 2,000,000 bushels of good grain were saved. These two counties will be sufficient to give an idea of the general condition of the country in Eastern Washington.

The estimated yield of the wheat crop in the spring was 15,000,000 bushels, while the actual yield, as far as can be ascertained, for 1893 was 12,000,000 bushels; 25·7 per cent. of the crop was unmerchantable, in some counties 50 per cent. was destroyed; the amount for export was only about 5,000,000 bushels.

Barley. Sowing of barley was begun in nearly all sections by the middle of April, though in some counties as late as June 1. The acreage of this crop compared with that of 1892 is reported to be an increase. This has been, on the whole, a very favourable season for barley, the yield having been fully up to the average. The harvesting of barley was nearly finished in all counties by the end of August.

Oats. The greater portion of the oat crop was planted in Western Washington before May 15, and in the eastern portion of the State a little later. The crop this year has been a tolerably satisfactory one. The yield in most cases was fully up to the average. The acreage of this crop compared with the preceding year shows an increase. Harvesting was begun about the middle of August in Eastern Washington, and about the end of the month in Western Washington, the season being from 2 to 4 weeks late.

Hay. The hay crop for 1893 was an excellent one, the quantity as well as the quality being up to the average in all sections of the State. The crop was harvested in good condition by the end of August in Western Washington and about 15 days later in Eastern Washington. Alfalfa in Eastern Washington yielding three crops a year, with an average total of 7 tons to the acre, worth about 1*l.* 8*s.* per ton.

The yields for 1893 for Washington were:—

Articles.		Quantity.
Wheat	Bushels (60 lbs.) ..	12,000,000
Barley	„ (48 lbs.) ..	2,000,000
Oats	„ (34 lbs.) ..	4,000,000
Hay	Tons (2,000 lbs.) ..	500,000

Prices all lower than in 1892. The highest price per bushel for wheat was 2*s.* 3*d.* and the lowest 1*s.* 10*d.* The quality of all crops as compared with 1892 was equal, with the exception of wheat, which was inferior. The wheat acreage in 1893 was 1,300,000 acres, while 1894 is estimated at 1,250,000 acres, being a decrease.

Hops. Owing to the lateness of the season, picking began from 1 to 3 weeks later than usual, this was rather an advantage though, because, when picked, the vines were better matured. The hops

in some yards were never picked, the rains setting in preventing their maturing. Spraying was kept up diligently whenever the aphis appeared, but the aphis and mould appear to have been scarce this year. The failure in some yards can only be accounted for by the climatic condition. The estimated number of acres in cultivation in the State is 8,000 acres, the estimated number of bales grown during the year 1893 was 42,000 bales, the average yield per acre being 945 lbs., the average price per lb. (ranging from 9½*d.* in the early season to the present price of 6½*d.*) was 7½*d.* It is estimated that there were 900 acres of new hops planted during 1893. (This increased acreage of first year hops accounts partially for the low average yield per acre of the 1893 crop.) The probable increase of new acreage during 1894 will be about 1,000 acres, which includes the 640 acre tract proposed to be planted out in the Yakima Valley in Eastern Washington. About 12,000 bales have gone forward to the London market where Washington hops are now known as a standard article. The estimated number of bales left unsold in Washington up to January, 1894, is 4,000 bales.

Farm wages.

Wages have always been high in Eastern Washington, but it is expected that a great reduction will be made in the wages paid next year; men received 4*s.* per diem for ordinary farm work, and from 6*s.* to 12*s.* per diem during harvest and thrashing. This season farmers are already hiring men from 2*l.* 12*s.* to 3*l.* 4*s.* per month, and there are many seeking work.

Prices.

Prices for farm produce have been very low as a rule during the past year in Eastern Washington, there being a few exceptions, particularly pigs, brood sows being in great demand and selling from 3½*d.* to 4*d.* per lb. alive, fat pigs sell from 10*d.* to 1*s.* dressed; the large amount of damaged grain, which is only fit for pigs, makes them very valuable this season. Cows and calves are also in great demand now for dairying purposes, while a year ago they could scarcely be sold at any price; beef cattle range about 3*l.* 12*s.* per head and upwards. Potatoes in Eastern Washington sold during the winter for about 1*s.* 8*d.* per 100 lbs. Poultry from 10*s.* per dozen for cockerels up to 14*s.* for good hens. Eggs ranged about 1*s.* per dozen.

In Western Washington a little better price was maintained, but everything was below the average of previous years.

Prospects for the year 1894.

The prospects for the coming year in the grain country may be considered to be good, although the ground has been thoroughly saturated with water from the continuous wet weather, which has retarded ploughing and the sowing of grain until late into the spring, thus making the spring work from four to six weeks later than usual. The present low price of grain and the high wages which farm labourers have always been paid up to the present time in Eastern Washington, upon the top of this disastrous season (not that the wheat crop is not sure enough, but there is no way of controlling the price or of harvesting dry wheat in a continuous rain storm), has caused many farmers to change their method of farming, viz., by renting, when possible, all the land except what could be tilled with the aid of one man, by summer

fallowing other portions, and supplementing dairying, pig, poultry, and fruit raising, &c., thus ensuring some return.

There has been no loss of stock during the past year, all having wintered well as far as known.

Horticulture.

The general fruit crop for the year has been a little below the average for the whole State; plums, prunes, apples an average crop; cherries short in Western Washington; peaches almost a failure in Eastern Washington; small fruits were a full crop, and vegetables good all over the State.

It is estimated that 1,000,000 lbs. of dried and evaporated prunes have been put up in 25 lb. and 50 lb. boxes during the season. The Alden dryer seems to be the one most generally used and the simplest. About 200 tons of fresh fruits, chiefly prunes, apples, and pears were shipped to eastern points in boxes of 50 lbs. each, netting to the grower an average of 4*s.* per box. The apple supply hardly equals the local demand.

The "Burbank" potato, grown chiefly in the Yakima Valley in Eastern Washington, is superior to any grown in the State, of the finest quality, mealy, solid, of fine grain and good size, yielding very largely, average per acre 350 bushels to 400 bushels (60 lbs.). Masters of vessels getting potatoes for their voyage home have generally been supplied with this variety, with a view of testing its keeping qualities. Reports are expected soon, giving the result.

Small fruits have averaged 1½*d.* to 2*d.* per lb. to the grower, and large fruits 4*s.* per 50 lb. box.

Freight rates for green or fresh fruits average ½*d.* per lb. to eastern points.

Fruit prospects (general) for the coming year are excellent; 15,000 acres are expected to be planted between October and April (1893–94), in addition to the 30,000 acres already planted. The ground has been thoroughly saturated this winter with water, so essential for crops east of the mountains.

The cultivation of the sugar beet is attracting just now considerable attention, and a proposition has been made by the analytical chemist at the State Agricultural Experimental Station at Pullman, to farmers in the several parts of the State, to plant an area with sugar beets which he will purchase from them, with a view of ascertaining the quantity and quality of the yield per given area, as well as the per cent. of saccharine matter contained; experiments so far have been very promising, particularly in Eastern Washington.

Orchards and gardens have been comparatively free from insects and disease, although scale and American blight (called here woolly aphis) made their appearance in a few places, but are being kept under control. There are seven commissioners appointed by the Governor of the State in different parts of the State, whose duty it is to promote all horticultural interests and prevent the spread of disease and insect pests. The officers of the State Board of Horticulture have also inspected very carefully orchards, nurseries, and yards all over the State, and have paid

special attention to trees brought into the State from other countries outside, with the result that many trees have been found invested with blight, which were at once ordered to be cleansed or requested to be destroyed. Frequent spraying and cleaning trees and every precaution to be taken has been recommended to farmers and growers with a view to stamping out disease and blight, but until proper methods and better laws are enacted by the State Legislature only moral suasion can be used, which generally extends just as far as personal interests are concerned.

The following is recommended as a spray or wash to be used before the month of March of each year for all fruit trees and plants found to be invested with San José scale, American blight, or oyster shell barklouse, which has been known to destroy these pests. Formula for 60 gallons: unslacked lime, 40 lbs.; sulphur (powdered), 20 lbs.; salt, 15 lbs.; concentrated lye, 2 lbs.; water to make 60 gallons.

The United States Land Office.

From the records of the United States Land Office at Seattle, it appears that during the year 1893 there were sold 25,046·07 acres of land at cash sale, mineral patents, &c. There were 20,378·51 acres in commuted homesteads. The total purchase price received was over 24,277*l.* (121,386 dol.). Fees and commissions amounted to 3,652*l.* (18,260 dol.). The number of homestead entries in 1893 were 796, and the number of pre-emption entries were 302, making a total of 1,098. The number of acres homesteaded in 1893 were 109,697·64. The number of acres pre-empted are not given.

Population and Assessment.

No census of the State has been taken during the past year, but there is probably only a slight increase over that of 1892.

The following statement taken from the report of the State Board of Equalisation shows: that the total number of acres of land, exclusive of town lots, is 13,457,664; and the total number of acres of improved land is 2,014,472. The valuation of lands, exclusive of improvements, is 17,505,494*l.* (87,527,472 dol.); and the valuation of improvements, 1,984,080*l.* (9,921,403 dol.); of town property, exclusive of improvements, 20,031,258*l.* (100,156,291 dol.); valuation of improvements, 5,919,186*l.* (29,595,930 dol.); the aggregate valuation of all real property, including improvements, except railway lines, is 45,440,018*l.* (227,201,096 dol.). The returns also show that there are in the State 171,518 horses, mules, and asses, valued at 1,038,597*l.* (5,192,986 dol.); 206,372 cattle, valued at 596,169*l.* (2,980,845 dol.); 290,021 sheep, valued at 116,008*l.* (580,042 dol.); 53,487 swine, valued at 37,442*l.* (187,211 dol.); and the aggregate of taxable personal property amounts to 8,233,112*l.* (41,165,560 dol.) for the 34 counties of the State.

The length of miles of rails laid in the State by the several

railroad companies is over 2,823, valued at 2,948,675*l.* (14,743,376 dol.).

The total value of real and personal property including railroad lines is 56,622,006*l.* (283,110,032 dol.); and the total amount of State tax to be paid is 167,035*l.* (835,175 dol.), making the rate of taxation for general State purposes for the year 1893, 3 mills on the dollar.

Financial condition.

The total balance on hand in the several funds of the State, according to the report of the State Treasurer for the quarter ending December 31, 1893, was 50,173*l.* (250,866 dol.). From the abstract of the report from the office of the Comptroller of the Currency at Washington City, showing the condition of all national banks doing business in the State of Washington to December 19, 1893, it appears that there are 59 banks doing business in the State.

From a census bulletin by the Commissioner of Labour it appears that there are in this State 1,543 manufacturing establishments. Estimated as follows:—

Description.	Number.	Value.	
		Sterling.	Currency.
		£	Dollars.
Value of land	..	1,826,786	9,133,932
Buildings	..	728,617	3,643,086
Machinery and tools	..	1,753,383	8,766,916
Capital invested ..	..	4,308,786	21,543,934
Miscellaneous expenses ..	..	436,111	2,180,557
Average number of employés	20,366	..	..
Wages paid to employés ..	..	2,531,723	1,658,614
Paid to officers, &c.	..	329,144	1,646,720
Cost of material used	..	3,983,411	19,917,057
Value of products	..	8,353,604	41,768,022
„ establishments ..	..	6,873,947	34,369,735

Business failures.

From Bradstreet's reports the number of failures in the State during the year 1893 was 170, against 172 in 1892; assets in 1893, 450,109*l.* (2,250,547 dol.), against 141,300*l.* (706,502 dol.) in 1892, and liabilities in 1893, 503,489*l.* (2,517,444 dol.), against 233,630*l.* (1,168,150 dol.) in 1892. It also appears from the record of suspensions, failures, and resumptions of business by national, State, savings and private banks, and loan and trust companies, that during the year 1893 there were 13 national bank failures with estimated assets, 1,083,000*l.* (5,415,000 dol.); liabilities, 790,800*l.* (3,954,000 dol.); 4 State banks, assets, 342,940*l.* (1,714,700 dol.); liabilities, 139,800*l.* (699,000 dol.); 3 savings banks, assets, 83,200*l.* (416,000 dol.); liabilities, 49,800*l.* (249,000 dol.); 4 private banks, assets, 118,851*l.* (594,254 dol.); liabilities, 99,157*l.* (495,784 dol.); 1 loan and

trust company, assets, 60,500*l.* (302,500 dol.); liabilities, 58,000*l.* (290,000 dol.), making a total of 25 failures, &c., with 1,688,491*l.* (8,442,454 dol.) assets and 1,137,557*l.* (5,687,784 dol.) liabilities. A majority of these banks, &c., have, however, made arrangements to commence business again this coming year, and many of them have already done so.

Aids to Commerce and Navigation.

Government hydrographic work.

The United States Government have had the coast survey steamer "Gedney" employed all the season continuing the triangulating of the Straits of Juan de Fuca, preparatory for still further extending the hydrographic and geodetic surveying of these waters, and good progress has been made. It is expected that the vessel will continue the work this season.

The branch hydrographic office recently established at Port Townsend by the Federal Government has been of great service to mariners visiting this district, who get the latest corrections for their charts and other marine information for all parts of the world, free of charge; it is to be regretted that more masters of vessels do not avail themselves of this privilege, and in return furnish what data they can of events occurring during the voyage to the United States naval officer in charge of this district, who is ever ready to acknowledge and give due credit for such returns.

Signal letters.

These were more fully explained in report for 1892, No. 1251, pp. 47, 48. It may be well again to mention for the benefit of masters bound with their vessels to ports in Puget Sound, many of whom appear to be still unaware of the fact, that the Board of Trade, London, under the direction of the United States Government, have allotted to Port Townsend in this State the signal letters "B," "W," "S," "Q."

Change in lights, buoys, &c., coast of Washington, 1893.

The changes to be noticed by masters entering Puget Sound, made during the past year particularly, are the following, viz.:—

Washington Sound, a fixed white light established on south-east end of Obstruction Island.

Admiralty inlet approach, a red nun buoy established off foul ground off Point Wilson.

Admiralty inlet approach, a red nun buoy established off foul ground off Middle Point.

Puget sound, a second class ice buoy placed to mark, eastern end of Decatur Reef.

Canal de Haro, Stuart Island, fog signal established at Turn Point Light Station.

Canal de Haro, fog signal established at Patos Island Light Station.

A life saving station established on west coast of Willapa Bay.

Columbia River entrance, Peacock Spit Buoy moved on account of shifting of channel.

Shoals and sunken rocks.

A shoal is reported as lying one-eighth of a mile S.E. of

Duncan Rock, Cape Flattery; also a rock lying three quarters of a mile north of Middle Point Straits of Fuca.

Admiralty inlet approach, a sunken rock lies half a mile off shore and three quarters of a mile west of Point Wilson.

Among other projected improvements are, a fog-signal to be placed on Marrowstone Point, Admiralty inlet; a better fog-signal is intended for Point No Point; a first order light is to be built at Gray's Harbour with fog-signal; a first order light at North Head, Cape Disappointment, has been authorised; a steam lightship and fog-signal is recommended for Umatilla Reef, and estimate of 16,000*l.* (80,000 dol.) submitted to Congress. Projected improvements.

The hydrographic office will begin publishing a monthly North Pacific pilot chart, provided Congress makes the necessary appropriation, and an advance sheet, to show the size and scope of the intended chart, was published in December, 1893.

The prospects for trade for the State generally, and in Tacoma and Seattle especially, for the present year are not very encouraging. Until capital is brought out and used in extending irrigation, mining, agricultural, and other projects in Eastern Washington and manufacturing industries in the Puget Sound country, there will be no radical improvement in the trade and commerce of the State. The establishing and operating of flour mills, rolling mills for the manufacture of iron and steel, glass works, fish and fruit canneries and many other industries are all contemplated by several towns, but until some universal improvement takes place there seems to be no inducement for investment of capital. General outlook.

The following is a more detailed report of the trade, commerce, and other matters of interest of Tacoma and Seattle separately.

Valuable information and assistance for these reports have been afforded by Lieutenant H. T. Mayo, U.S.N., at Port Townsend, to Mr. Alexander Baillie, of this town, to Mr. H. F. Alciatore and to the officials of these two towns.

General Remarks.

Tacoma, the second largest town in the State, but the chief export one, has been affected by the universal depression which has prevailed during the past year, and it will take some months for business to recover, which must be commenced in the eastern cities of the United States first, and then make its way westward, consequently no great improvement can be looked for during this coming year. General remarks,

Both the exports and imports show a great decrease, which is most perceptible in the imports; the low price of wheat which has prevailed during the past season has mainly been the cause of the low value of exports, as the quantity shipped was considerably in excess of the previous year, 1892; the falling-off in imports seems to be general, arising from the unsatisfactory condition of business.

The wheat crop, the chief article of export, has turned out better than expected at one time, but the price has never been so low.

Freights by sailing ships to the United Kingdom were, highest, 1*l.* 15*s.*; lowest, 1*l.*

Shipping and Navigation.

The following table shows the number and nationalities of vessels which entered and cleared during the past year:—

Annex A.—RETURN of all Shipping at the Port of Tacoma during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	19	37,491	19	26,279	38	63,770
American	7	9,302	11	1,228	18	10,530
German	1	1,567	...	...	1	1,567
Total	27	48,360	30	27,507	57	75,767
,, for the year preceding ...	41	62,854	34	15,990	75	78,844

CLEARED

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	34	58,896	22	28,391	56	87,287
American	19	18,113	10	4,380	29	22,493
German	1	1,567	...	...	1	1,567
Sandwich Islands ...	1	839	...	...	1	839
Total	52	79,415	32	32,771	84	112,186
,, for the year preceding ...	45	68,597	29	17,053	74	85,650

NOTE.—The entrances and clearances of American vessels do not include the domestic trade.

The Annexes A, B, and C in this report have been obtained from the custom-house records at this sub-port through the courtesy of J. C. Saunders, Esq., collector of customs for this Puget Sound district, and represent distinctly the foreign business only, no domestic trade being taken account of.

Decrease in entrances.

The number of British vessels entering the port was 17 less than in 1892, but the clearances show one vessel more than in that year. There is, however, a marked increase in the registered tonnage of individual British vessels, some of the largest ships having visited this port during the season.

The harbour master reports that during the year 1893, 399 vessels, with a total of 529,183 registered tons, entered the sub-

port of Tacoma, and 401, with a total of 535,070 registered tons, departed. The inward cargo tonnage was 86,969, and the outward 524,416. This does not include the local vessels which ply up and down Puget Sound.

Trade and Commerce.

The following tables show the exports and imports for the past 2 years :—

Annex B.—RETURN of Principal Articles of Export from Tacoma during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Wheat	Bushels ...	3,481,629	448,308	3,177,323	528,921
Flour	Barrels ...	163,235	104,402	139,697	105,333
Timber	Feet ...	11,500,000	25,268	...	8,750
Fish, tinned salmon ...	...	...	39,648	...	292
Other articles	...	...	14,350	...	367
Total	...	...	631,976	...	643,633

RETURN of Principal Articles of Import to Tacoma during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Free—					
Tea	Lbs. ...	57,484	1,232	239,361	5,297
Sugar	,, ...	3,012	93	100,800	624
Household effects	...	...	83	...	3,045
Other articles	...	...	757	...	3,638
Total	...	...	2,165	...	12,604
Dutiable—					
Sugar	Lbs. ...	728,000	5,504	1,588,460	12,464
Rice	,, ...	170,550	399	240,380	954
Flax, &c.	...	...	294	...	5,556
Cement	Barrels ...	...	2,159	2,800	805
Fish	...	...	680	...	...
Wine	...	...	17	...	230
Other articles	...	...	295	...	1,941
Total	...	...	9,348	...	21,950
Grand total	...	...	11,513	...	34,554

NOTE.—Exchange has been reckoned at 5 dol. to the *l.*

Among the "other articles" in the export table are included beer, condensed milk, and ginsing, amounting to probably 13,600*l.*, all sent to Chinese and Japanese ports.

The goods and merchandise shipped through in bond, of which no account is taken in the import table, for immediate transportation

from the Orient to other places in the United States of America and Canada, estimated to be of 1,089,181*l.* value, were brought over chiefly by the steamships of the Northern Pacific Steamship Company, in addition to two cargoes of tea carried in sailing vessels; these goods are transferred directly from the holds of the vessels to the trains, which are run along the wharves, and as soon as made up are started for their destination, the utmost despatch being used to get the advantage of the markets. The amount of merchandise of this class, on account of the quick despatch partly, has increased very largely over 1892. This port, however, is not given any credit for these shipments as they are made "in bond" to their ports of destination, where the duties are paid.

Decrease of exports and imports.

The exports show a falling-off of 11,657*l.* as compared with 1892. The imports show a decrease of 23,041*l.* as compared with last year.

Wheat and flour.

The exports of wheat and flour show a considerable increase in quantity as compared with 1892, but the low prices have had a serious effect upon the valuation.

The exports of flour show an increase, being 163,235 barrels in 1893, as compared with 139,697 barrels in 1892. The valuation, however, is almost 1,000*l.* less. With the exception of one cargo going to the United Kingdom, all the flour exported was carried by steamship to China and Japan.

EXPORTS from State of Washington viâ Puget Sound.

Articles.		Quantity	Value.	
			Sterling.	Currency.
			£	Dollars.
Wheat	Bushels ..	3,616,350	468,031	2,340,156
Flour	Barrels ..	172,008	107,118	535,588
Oats	Bushels ..	850,000	53,200	266,000
Salmon	Cases ..	42,244	42,300	211,500

No barley was exported.

The harbour master, according to his statement, reports that during the year 1893 there were 3,614,673 bushels of wheat shipped, approximate value 437,000*l.* (2,185,000 dol.); 173,494 barrels of flour, valued approximately at 108,391*l.* (541,957 dol.); the amount of timber shipped was over 62,000,000 feet, estimated value 135,530*l.* (677,650 dol.); the coal shipments amounted to 305,461 tons, with an estimated value of 218,775*l.* (1,093,875 dol.); the value of tinned salmon was 27,854*l.* (139,370 dol.). In addition there was a large amount of general merchandise passed over the wharves, of which it is impossible to get any approximate figures. These figures show an increase in the exports as compared with the year 1892.

Trade with China and Japan.

The Northern Pacific Steamship Company, composed of the steamers "Tacoma," "Victoria," and "Mogul," perform a monthly

service between this port and Hong-Kong, touching at Victoria, British Columbia, and various ports in Japan and China each way. This line of steamers, which has been running scarcely 2 years, is building up considerable trade between the north-west and Asia, and the flour business, their chief cargo westward, is increasing year by year. This article is exported principally to Yokohama and Hong-Kong, which are distributing centres for Japan and China, is manufactured in the States of Oregon and Washington, and all, except that which is made by the local mills here, is brought to Tacoma by rail and loaded direct into the steamers from the trains.

Inward cargoes by these steamers are composed principally of tea, silk, sugar, rice, matting, and curios, the bulk of which is transported by rail to the States, east of the Rocky Mountains, and Canada, and with very few exceptions these steamers have all brought full cargoes.

Westward freights are improving, and it is fair to suppose that in the near future the present steamers running, whose aggregate net tonnage is 5,480 tons, and average speed 11 knots, will be supplanted by larger and faster boats with more frequent sailings. These steamships now carry the mails each way, receiving *sea* pay; all the Oriental mail being sent by them, when leaving one day before the Pacific Coast Mail steamers leave San Francisco, and when such steamers call at Honolulu.

Timber.

The timber trade is represented by eight saw mills and six shingle mills, which were in operation during the year 1893, and the town ranks first as a timber shipping centre so far as rail shipments are concerned, the mills having furnished about one-sixth of the total shipments made over the Northern Pacific Railway as follows: to transcontinental points, timber, 491 truck loads; shingles, 541 truck loads. To Eastern Washington points (local), timber, 529 truck loads; shingles, 28 truck loads. To Union Pacific points, timber, 23 trucks; shingles, 108 trucks; making a total of timber shipments 1,043 trucks, and 677 trucks with shingles. The weight of timber was over 31,382,000 lbs., and shingles 16,211,000 lbs., having a minimum weight of 24,000 lbs. to the truck load. The freight charges were about 34,000*l*. The freight rates during the year on timber to eastern points seem to have been decreased but raised on shingles, averaging in each case about 2*s*. per 100 lbs.

An attempt was made to raft timber from one of the saw mills on the coast down to San Francisco, but the raft was broken to pieces almost immediately it was taken outside the harbour by the rough seas encountered. Unsuccessful attempts were subsequently made, consequently it is doubtful if the experiment will be repeated.

Dry dock.

The Puget Sound Dry Dock Company, with their floating dock at Quartermaster Harbour, have had 49 vessels, aggregating 29,516 tons in dock during the year, being 39 steamships with 15,919 tons gross register, and 10 sailing vessels with 13,597 tons net register, the largest being the British ship "Olive Bank,"

2,647 tons register. There was also the "Dalgonar," of 2,565 tons, besides vessels of the United States Government. An average of 70 men have been employed during the year, with a monthly pay roll averaging 900*l.*

The property consists of the dock, approaches, blacksmith shop, fresh-water system and hotel accommodations for visitors, managers, and employés.

The rates for steamers on gross tonnage was:—

From—	To—	Per Ton.	
		First Day.	Lay Days
Tons.	Tons.	Cents.	Cents.
100	1,000	50	25
1,000	2,000	40	20
2,000	3,000	30	20

3,000 tons and upwards, 20 c. per ton per day.

The rates for sailing vessels on net tonnage was:—100 tons, 50 dol. (10*l.*) per day.

From—	To—	Per Ton.	
		First Day.	Lay Days.
Tons.	Tons.	Dol. c.	Cents.
100	500	0 50	25
500	1,000	0 40	20
1,000	2,000	400 0*	20
Over 2,000	..	0 20	20

* 80*l.*

Cargoes charged for at the same rate as tonnage. No charge for ballast. These rates are probably the lowest on the coast. Contracts are made when desired for dockage, scraping, painting, and any other work.

Tacoma smelter.

The Tacoma Smelting and Refining Company produced during the past year about 45,571 bars of bullion, weighing 4,772,293 lbs. Of this 17,852 ozs. were gold, 484,949 ozs. were silver, 4,737,674 lbs. were lead, the total value being about 182,319*l.* (911,595 dol.). The bullion is shipped to the refinery at San Francisco, there being no refinery in operation here. The ore purchased during the past year by this company mined in the State of Washington was from:—

From—	Quantity.		
	Ore.	Gold.	Silver.
	Lbs.	Ozs.	Ozs.
Okanogan county	671,777	17·14	47,056·65
Stevens „	5,853,210	0·69	44,573·70
Peshastin district	245,622	421·49	433·85
Total	6,770,609	439·32	92,064·20

The following table shows the value of all exports and imports:—

Annex C.—TABLE showing Total Value of all Articles Exported from and Imported to Tacoma from and to Foreign Countries during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	430,002	594,687	2,500	20,302
France	66,190	..	..	..
Mexico	12,859	..	..	..
Belgium	9,000	38,016	..	..
Australia	5,950	1,726	..	..
Sandwich Islands ..	1,300	..	..	..
China and Japan ..	105,056	180	5,918	7,141
Canada	1,619	4,288	3,095	6,107
Other countries ..	..	4,736	..	1,004
Total	631,976	643,633	11,513	34,554

NOTE.—The domestic trade and goods for immediate transportation are not included in this table.

Great Britain is credited with the value of the wheat cargoes contained in the large number of vessels which clear for Queenstown or Falmouth for orders. Many of them, however, receive orders at these ports of call to proceed to continental ports to discharge, so the actual value of the exports to Great Britain will probably be very largely reduced. Next to Great Britain in the value of wheat exports is France, to which country also a cargo of timber was shipped, although the largest export value of timber was made to Mexico.

Population and Industries.

Population. Tacoma has an estimated population of 54,000 people, and at the last registration there were 7,997 names recorded having legal votes.

Death rate. The total number of deaths occurring during the past year was 296, 188 males and 108 females. The death rate is very low, being about 5·7 per 1,000.

Diseases. The diseases which caused the greatest number of deaths were consumption, 53; heart disease, 30; pneumonia, 19; and Bright's disease, 13; a total of 115. Seven cases of small-pox, all of which were brought in from outside, occurred in the town, four of which proved fatal. Precautionary measures were adopted, and in no single instance was the disease communicated to a second person.

There were 780 births reported, 412 being males and 368 females. On account of the failure and negligence of some physicians and other persons to comply with the ordinances relating to this subject these returns are very incomplete. The report of deaths, however, is quite complete, as a burial permit cannot be obtained until a death certificate has been filed at the office of the health officer. The health officer reports that many notices have been served on householders to abate nuisances and attend to sewers, &c., which have generally been complied with, followed with satisfactory results, and considering the size of the town and its rapid growth, its sanitary condition is on the whole good, still leaving room for many improvements. By order of the health officer five horses suffering from glanders were condemned and destroyed, thus preventing this disease spreading and becoming epidemic.

Industries. The Puget Sound flouring mill has had a very good year, the product being valued at about 250,000*l.* (1,250,000 dol.), most of which has been exported to China and Japan. The Puget Sound Fishing Company have caught and disposed of about 1,616,800 lbs. of fish during the past year, including 650,640 lbs. of halibut, 560,600 lbs. of salmon, and 405,500 lbs. of small fish, of a total value estimated at about 21,631*l.* (108,155 dol.).

The aggregate amount of the value of Tacoma's industries is estimated to be about 1,390,200*l.* (6,951,000 dol.), and the wholesale and retail trade about 2,021,860*l.* (10,109,300 dol.).

From a census bulletin, by the Commissioner of Labour, of manufactures in 165 principal cities of the United States, having a population of 20,000 or over, the report for this town shows that the number of manufacturing establishments is 225.

Description.	Number.	Amount.
		£
Value of hired property	..	106,890
Land	..	556,379
Buildings	..	125,807
Machinery and tools	..	313,065
Raw material	..	116,967
Products on hand	..	102,508
Cash, bills, and accounts	..	230,712
Aggregate capital invested ..	..	1,552,328
Rent paid	..	14,530
Taxes, internal revenue, &c. ..	..	15,064
Insurance	..	7,983
Repairs	..	12,728
Interest on cash	..	13,003
Sundry expenses	..	29,625
Aggregate expenses	..	92,933
Average number of employés ..	4,067	..
Total wages paid employés	..	656,164
Officers, firm members, and clerks ..	397	..
Salaries drawn by them	..	109,439
Total cost of materials used	..	1,034,331
„ value of products	..	2,086,591

Public Works.

Public works. Street improvements.

During the past year $6\frac{3}{4}$ miles of streets were graded. There was over $\frac{1}{2}$ mile of bituminous rock pavement laid, costing 13,990*l.* (69,950 dol.) in addition to 1,085 lineal feet of plank pavement costing 567*l.* (2,835 dol.).

Three trestle wooden bridges were built in the town during this period, the total length being 1,655 feet, and the total cost 3,328*l.* (16,640 dol.). They spanned gulches, and are from 160 feet to 175 feet high. The Northern Pacific Railway Company have completed a new iron bridge within the town with stone piers at a cost of 30,000*l.*, and an iron subway with stone abutments at a cost of 5,000*l.*

There were about $4\frac{1}{2}$ miles of sewers laid during the past year at an expenditure of about 6,044*l.* (30,220*l.* dol.). Tile pipes from 8 inches to 10 inches in diameter being mostly used. There are in all 54·63 miles of sewers, which cost 81,958*l.* (409,790 dol.).

The acquisition by the town of the light and water works cost 350,000*l.* (1,750,000 dol.), and extensions to a new source of supply sufficient to bring into the town 10,000,000 gallons of water per diem by gravity are to be made immediately, for which the sum of 66,000*l.* (330,000 dol.) is available. The town being bonded for these amounts, the bonds running for 20 years at 5 per cent. The revenues derived from this source have been sufficient to pay operating expenses, interest, repairs, and maintenance, and

produces a net income of about 700*l.* (3,500 dol.), which is being used in the extension of the distributing system.

Fire Department.

The total expenses connected with the Fire Department during the past year were 14,420*l.* (72,104 dol.), of which amount 12,043*l.* (60,216 dol.) were expended in wages.

New buildings.

Almost 400 permits for new buildings have been issued, the estimated cost being about 115,526*l.* (577,630 dol.); the Pierce County Court House, Chamber of Commerce Building, the Town Hall, and the Jewish Synagogue, &c., being the principal ones completed during the past year.

Financial condition.

There are now a total of 16 banks in the town (5 National, 3 State, 6 Savings, and 2 branches of foreign banks). On account of the general uneasiness the deposits have decreased during the past year fully one half, and the bank clearances during this time have been 7,124,492*l.* (35,622,462 dol.), being very much less than the previous year, but better than anticipated. Business has been very much depressed, with very little sign of improvement.

The equalised valuation of property in Pierce county, according to the county assessment rolls for 1893, was 9,175,600*l.* (45,878,000 dol.). The tax levy within the town was 13·8 mills on the dollar, and outside the town limits 12·7 mills.

The assessed valuation of the town property for 1893 according to official statement is 8,310,688*l.* (41,553,440 dol.) as compared with 8,614,829*l.* (43,074,147 dol.) for 1892. The tax levy for 1893 is 10 mills against 12 mills on the dollar on 1892. Assessment roll is 83,247*l.*

The following is a statement of the indebtedness of the town of Tacoma on January 1, 1894 :—

Description.	Amount.		
	£	£	£
On warrants—			
General	186,897		
Sewer	4		
Road	42		
City Hall	11,274		
		198,217	
Deduct—			
Cash in general fund ..	84,815		
Tax certificates	914		
Uncollected assessment roll, 1892	1,778		
Roll 1893	23,673		
		111,180	
		87,037	
Add—			
Estimated for interest ..	..	10,000	
			97,037
On bonds—			
Funded Debt	70,000		
City Hall	40,000		
		110,000	
Deduct—			
Cash in sinking fund ..	3		
Investment account	4,278		
		4,281	
			105,719
Water and light bonds, dated June 1, 1893	..	..	416,000

The city of Tacoma has no street or sewer improvement bonds. These warrants issued for street and sewer improvements are not treated as indebtedness of the town, the assessments against the property benefited by such improvements are expected to pay the sum of the warrants issued in payment of improvements. The assessed valuation of the property in the town for 1894 is 7,655,910*l.* (38,279,549 dol.). The assessment roll in the hands of the County Treasurer for collection at 5 mills is 38,279*l.* (191,397 dol.).

The Harbour-master collected from the various vessels which used the buoys in the harbour during the past year, the sum of 100*l.* in round numbers, which was turned over to the town as revenue.

Seattle.

General Remarks.

Seattle, the chief town in the State of Washington, is situated in King county, on the east side of Puget Sound, having an area of 31 square miles with 57 acres of public parks. The General remarks.

wharves, warehouses, railways, mills, shops, factories, wholesale houses, fisheries, timber yards, &c., occupy the low lands on the water front; while the retail shops, hotels, schools, churches, public buildings and residences built upon the slopes and high-lands extending from the tide-water, give the town a very fine appearance on approaching it either by land or water.

Here the Federal Government have the United States District and Circuit Courts, United States Land Office, Custom-house, Weather Observance and Signal Service offices, Internal Revenue office, United States Depository, Office of the Geological Survey, two Commissioners, and a United States Recruiting Station.

This town has also been affected by the universal depression which has prevailed during the past year, and has caused a very great decrease in the volume of business done here, the result being apparent in almost every branch of trade and line of business.

The United States Signal Service and Weather Department, as well as the State Weather Service, each happen to be operated from this town, a great benefit to commerce and shipping generally, as all weather observations are displayed from their respective stations; reports from other stations being received three times daily.

Shipping and Navigation.

The following table shows the number and nationality of vessels which entered and cleared during the past year:—

Annex A.—RETURN of all Shipping at the Port of Seattle during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	3	1,109	8	2,267	11	7,376
American ...	25	11,745	92	129,793	117	141,538
Sandwich Islands ...	1	2,327	...	...	1	2,327
Swedish	1	1,126	...	...	1	1,126
Norwegian	1	818	...	...	1	818
Total ...	31	21,825	100	123,060	131	144,885
,, for the year preceding ...	5	6,490	4	781	9	7,771

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	2,334	10	4,965	11	7,299
American	24	8,454	45	17,601	69	26,055
Hawaiian Islands ...	1	2,027	...	...	1	2,027
German	1	1,726	...	...	1	1,726
Norwegian	1	818	...	...	1	818
Total	28	15,359	55	22,566	83	37,925
,, for the year preceding ...	4	7,665	7	3,854	11	11,519

NOTE.—The entrances and clearances of American vessels do not include the domestic trade.

The annexes "A," "B" and "C" in this report have been obtained from the custom-house records at this sub-port through the courtesy of J. C. Saunders, Esq., collector of customs for this Puget Sound district, and represent distinctly the foreign business only, no domestic trade being taken account of.

Increase of entrances and clearances.

The number of vessels clearing and entering from the port was very much greater than in 1892, all in that year being British vessels. The report of the Harbour-master shows that for the past year 168 steamships with a total tonnage of 235,847, and 119 sailing vessels with a total tonnage of 102,425, making a total of 287 vessels of 338,272 tons, called at this sub-port; being a decrease from the previous year of 73 vessels with 57,476 tonnage.

Harbour improvements.

Also that improvements in harbour facilities during the past year have been the placing of three additional buoys in the harbour for the mooring of vessels while in port, and the extension of wharves, docks, &c., and other improvements are still further contemplated for the accommodation of the trans-Pacific and ocean steamers now calling here.

Trade and Commerce.

The following tables show the exports and imports for the past two years:—

Annex B.—RETURN of Principal Articles of Export from Seattle during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Wheat	Bushels .	272,300	32,000	340,678	67,465
Wood	Feet ..	5,280,000	9,000	..	1,971
Coal	Tons ..	1,146	725	..	204
Cement	Barrels ..	2,452	1,080	..	..
Other articles ..	..	..	3,522	..	17,669
Total	..	..	46,327	..	87,309

RETURN of Principal Articles of Import to Seattle during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
FREE.					
Tea	Lbs. ..	2,741	133	14,166	3,661
Other articles ..	..	..	1,740	..	12,392
Total	..	..	1,873	..	16,053
DUTIABLE.					
Sugar	Lbs. ..	4,156,000	15,000	2,065,000	16,833
Rice	„ ..	667,000	1,800	516,000	1,867
Cement	„ ..	3,440,000	2,050	5,256,000	3,845
Other articles ..	..	..	10,000	..	5,083
Total	..	..	28,850	..	27,628
Total free and dutiable ..	..	..	30,723	..	43,681

NOTE.—The *l.* has been reckoned at 5 dol.

No account in these tables is taken of the goods and merchandise shipped through in bond for immediate transportation.

Decrease of exports and imports.

The exports show a falling-off of 40,982*l.* as compared with 1892 and the imports show a decrease of 12,958*l.*

Wheat and flour.

The exports of wheat show a large decrease in both quantity and value as compared with 1892; while no quantity of flour has been exported during the past year.

The export of coals to British Columbia has increased to almost 500*l.* over 1892. Coal.

The timber trade is represented in this town by about 12 saw mills, with others immediately tributary to it, most of which have been in operation during the year 1893; producing over 96,000,000 feet of timber. The large saw mill at Port Blakeley, just across Puget Sound in Kitsap county, may, in a measure, be considered tributary to this sub-port, which produced during the same period over 82,000,000 feet, of an average value of 2*l.* per 1,000 feet. The shingle mills in this county (King) made over 486,000,000 shingles, estimated value about 130,231*l.* (651,157 dol.). The cargo exports, foreign, of timber from this port show an increase during the year of over 7,000*l.* Timber.

There were shipped during the past year from this town to eastern markets by the Northern Pacific Railway and the Great Northern Railway an average of over 50 truck loads of fish, being about 1,000,000 lbs. of fish per month; the Northern Pacific alone carrying 66 tons from July to December, 1893. There were also put up here 35,000 cases of tinned salmon, valued at about 28,000*l.* (140,000 dol.). Fish.

The following table shows the value of all exports and imports:—

Annex C.—TABLE showing Total Value of all Articles Exported from and Imported to Seattle from and to Foreign Countries during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	32,000	82,083	7,600	9,050
Canada	5,327	203	2,523	33,524
Australia	4,000	..	..	..
China and Japan ..	2,000	309	20,000	904
Sandwich Islands ..	2,000	..	..	..
South Africa	1,000	..	..	..
Belgium	..	..	500	..
Other countries ..	..	4,714	100	203
Total	46,327	87,309	30,723	43,681

In comparing the past year 1893 with 1892 it must be noted in the foregoing table, that in 1892 Hong-Kong merchandise was included in that of Great Britain; in 1893 this port is included under China and Japan, and it has been attempted to give the estimated values of all the imports from China and Japan whether they came over by the Canadian Pacific Company's steamships viâ Victoria, British Columbia, or by the Northern Pacific Steamship Company's steamships viâ Tacoma to this port, which will account for the enormous decrease in imports from Canada for 1893.

The report of the Harbour-master also shows that merchandise to the value of 11,237*l.* (56,188 dol.) was imported, and 51,607*l.* (258,034 dol.) was exported; the former being a decrease from last year of over 2,000*l.*, but the latter an increase of over 9,900*l.* Over 44,000,000 feet of timber were exported, being a decrease of over 25,000,000 feet compared with 1892. These figures include the domestic trade, which can really only be estimated, especially as regards the values.

Population and Industry.

Population. Seattle has a population of 60,000, and at the last registration there were 10,000 names recorded having legal votes.

Health: Births and deaths. There were 661 birth reports, of which 363 were males, 296 females, and 2 sex not stated. There were 53 still-births reported. The returns are not very complete.

The total number of deaths occurring during the year was 485, 293 being males and 192 females, the death-rate being 8·08 per 1,000. This low death-rate is due to the absence of epidemics and to the comparative infrequency of fatal infectious diseases.

Diseases. Small-pox, which was brought here in the autumn of 1892, continued to appear during January and February, 1893, there having been 25 cases discovered during those months, which, with three other cases later in the year, made a total of 28 new cases during the year, with 11 deaths; but the prompt efforts of the department prevented its spread, and were successful in standing off the disease. There were 67 cases of typhoid fever with 19 deaths, these deaths and cases resulted from the failure of physicians to report as required by law; in all cases reported, premises were immediately inspected by the health officer and in most cases it was found that the plumbing was defective. One death was attributed to membraneous croup, but none to whooping cough. Several cases of measles occurred between the months of March and July. Influenza (la grippe) made its appearance during the autumn, and more than a quarter of the deaths of December are from this cause.

Causes.	Number of Deaths.		
	Male	Female.	Total.
Zymotic diseases	55	42	97
Constitutional diseases..	48	42	90
Development diseases	27	30	57
Local diseases	116	69	185
Accidents and violence ..	46	8	54
Unknown	1	1	2
Total, all causes ..	293	192	485

The health officer reports that there were 113 houses connected with sewers during the year, and 227 sewer inspections, and a total of 1,037 causes of nuisance inspected and ordered abated by notices served by this department.

The inspection of the public and private schools has shown them to be generally in a sanitary condition. The market inspector's report for the year shows that 19,700 gallons of milk were inspected, out of which 403 gallons were condemned, besides a large amount of fruits, vegetables, fish, and pork. The inspection of milk used in the town is most important, as large numbers of infants are nourished by cows' milk. In a recent opinion the Corporation Counsel maintained that the only persons the town was legally bound to take care of were those afflicted with diseases dangerous to the public health and prisoners confined in the town jail; and the health officer consequently refuses hospital care to sick and injured persons, except in the cases above-mentioned, thus saving an average cost to the town of 50*l.* (250 dol.) per month. At present the indigent sick are taken care of by the County Commissioners.

Climate.

From the report of the "Observer" of the United States Weather Bureau, the meteorological conditions during the year 1893 were as follows:—

Temperature, monthly mean, 50 degrees, the highest being 69 degrees and the lowest 30 degrees. For the same period the monthly rainfall was 3·76.

The monthly snow fall 4·2.

Education: Public schools.

According to the assessors census, the population of the town in 1893 was 62,000. The total school population from 5 to 21 years of age was: males, 4,770; females, 5,095; total, 9,865. The average number belonging in 1893 was 5,080. The average daily attendance was 4,715. There were 131 teachers and 4 supervisors.

The total assessed valuation of the town was 8,760,543*l.* (43,802,716 dol.); the total value of school property was 131,240*l.* (656,200 dol.). The total assessed valuation per capita of school population was 888*l.* (4,440 dol.).

The cost of supervision and teaching per capita was 7*l.*, being about 6*d.* (12$\frac{3}{5}$ c.) per diem; total cost, 24,512*l.* (122,560 dol.).

The cost of total expenditures per capita was almost 10*l.* (50 dol.); total expenditures, not permanent, were 32,704*l.* (163,521 dol.). The average salary paid teachers per annum was 155*l.* below the high school, and 240*l.* in the high school. The average salary paid principals of the district was 316*l.* The average salary paid the town superintendent of schools was 600*l.* (3,000 dol.).

The total receipts for the year 1893 were 49,312*l.* (246,565 dol.), of which amount 47,692*l.* (238,462 dol.) were from taxes, 1,551*l.* (7,755 dol.) proportion of State funds by county superintendent, and 69*l.* (347 dol.) were from other sources. The total disbursements for the year were 60,508*l.* (302,541 dol.).

The State University.

The State University is at present situated within the town,

but 320 acres have been secured in the suburbs fronting on Lakes Union and Washington, and 34,000*l.* have been appropriated by the legislature for buildings; besides 100,000 acres of State lands have been granted to the University, from which 300,000*l.* are expected to be derived. The Episcopalians, Roman Catholics, and other religious organisations have educational institutions in the town, in addition to other private boarding schools, schools of art, business colleges, and kindergartens.

Public Works.

Public works: Buildings and streets improvements, &c.

Building operations during the past year have been affected by the general stagnation in business; still 1,335 permits were issued for buildings and repair work in Seattle, amounting to 222,000*l.* (1,112,559 dol.).

The total length of streets improved in the town on January 1, 1893, was 90·15 miles.

The total length of streets improved in the town during 1893 was 6·97 miles.

There has been 6,400*l.* (32,000 dol.) expended in labour on the streets during the past year, in addition to 2,600*l.* (13,000 dol.) expended in materials, &c., for repairs, making a total expenditure for all purposes upon streets during the past year of 9,000*l.* (45,000 dol.).

In the sewer department almost 4,000*l.* (20,000 dol.) were expended in labour (partly in constructing new connecting sewers), in addition to 1,500*l.* (7,600 dol.) for materials, pipe, brick, lime, cement, &c., making a total expenditure for all purposes upon the general sewers of the town of 5,500*l.* (27,600 dol.).

The daily average consumption of water during the year has been 4,892,615 gallons, being a per capita average of 122 gallons daily. There are three pumping stations situated in different parts of the town, taking the supply from Lake Washington. The receipts from water tax (rent) during the past year were 29,150*l.* (145,739 dol.), being an increase over 1892 of above 1,600*l.*, although a reduction in metre rates of over 10 per cent. had been made, and no charge made for irrigation. The operating expenses for 1893 were 12,140*l.* (60,712 dol.), an increase over 1892 of about 1,600*l.* (8,000 dol.), due partly to the increased price of coal. The statement in the report shows that there were receipts from consumers, 29,150*l.*; for water to town (receipts), 6,540*l.*; total receipts, 35,690*l.* The operating expenses were 12,140*l.*, thus showing a gain of 23,550*l.* The balance-sheet shows resources to be 159,580*l.*, and liabilities, 203,000*l.*

Industry.

A census of factories, taken by the Commissioner of Labour, from a census bulletin of manufactures in 165 principal cities of the United States, having a population of 20,000 or over, the report for this town shows that there are 331 manufacturing establishments. Estimated:—

Description.	Number.	Amount.
		£
Value of hired property	..	209,287
Land	..	125,650
Buildings	..	136,547
Machinery and tools	..	286,070
Raw materials	..	92,392
Products on hand	..	130,191
Cash, bills, and accounts	..	180,808
Aggregate capital invested ..	..	1,160,945
Rent paid	..	26,223
Taxes, internal revenue, &c.	..	17,671
Insurance	..	10,273
Repairs, &c.	..	6,041
Paid to contractors	..	1,060
Interest on cash	..	8,401
Sundry expenses	..	29,340
Aggregate expenses	..	99,009
Average number of employés	4,048	..
Total wages paid employés	..	681,104
Officers, firm members, and clerks ..	275	..
Salaries drawn by them	..	63,982
Total cost of materials used	..	955,677
„ value of products	..	2,040,601

Fire Department.

The total cost of maintaining this department for the year 1893 was as follows:—18,800*l.* (94,287 dol.); of which amount 14,500*l.* went towards salaries; 2,300*l.* for current expenses; 1,600*l.* for new equipment, and 400*l.* for rent of ground, insurance, &c. The department has responded to 197 alarms during the past year. The total loss for the year was 16,802*l.* (84,000 dol.), with insurance involved amounting to 278,116*l.* (1,390,580 dol.). One new engine company has been organised during the past year and one new hose company. The force now consists of 76 men and 35 horses in addition to the engines, &c. 19 hydrants have been put in during the past year, making a total of 485.

Police Department.

This force, in its various departments, consists of 62 persons. The total number of arrests made during the past year was 4,590; of which 3,112 were males and 1,478 females. The total amount received for bail and fines for the year 1893 was 4,476*l.*; and the value of money found on the persons arrested was 1,861*l.* The total cost for 13,784 meals was about 469*l.* Property to the amount of 2,534*l.* was reported stolen and 1,234*l.* recovered. The cost and expense of this department during the year 1893 was 12,846*l.*, and the total value of all property in this department was 2,546*l.*

Public library.

The cost of this department for the past year for books, magazines, rent, salaries, insurance, &c., amounts to 2,008*l.* The number of books now in the library is 11,048, of which an average of 321 were taken out daily. These books embrace useful and

standard philosophical, historical, literary, scientific and art works. More commodious and large quarters are expected to be procured very soon.

The post office receipts during the year 1893 amounted to 20,200*l.* (101,151 dol.).

Financial condition.

The total assessed valuation of the town for the year 1893 was 8,760,143*l.* (43,802,716 dol.). The tax rate under the old limits was 13 mills on the dollar, under the new limit 10·7; the total rate on property, including county and town rate within the limits of the town, under the old limits was 28·8, and the same under the new limits was 26·5. The actual indebtedness of the town upon all accounts, according to the official statement on January 1, 1894, was:—

Description.	Amount.	
	Sterling.	Currency.
	£	Dollars.
Floating indebtedness	129,889	649,446
Bonded „	582,000	2,910,000
Total	711,889	3,559,446

The amount of interest paid and incurred by the town during the past year was 36,488*l.* (182,444 dol.); as the floating indebtedness is now funded into interest bearing 5 per cent. bonds, the actual total annual interest to be met by the town is 35,520*l.* (177,600 dol.).

The receipts from:—

	Amount.
	£
Licenses, fines, &c., amount to	20,366
Taxes	93,873
Bonds (sewer and drainage, 1893)	46,060
Revenue from waterworks, &c.	29,646
Miscellaneous	35,638
Total	225,583

A statement of the bank clearances in this town for the past year prepared by the Manager of the Seattle Clearing-house, shows that the total amount was 8,029,525*l.* (40,147,624 dol.); September being the worst month. There were no bank failures during the past year, although some large business houses went into liquidation and had receivers appointed until their affairs could be adjusted. Some eastern capital is already seeking investment in Seattle, which town will probably be the first to

feel the change for the better. It has held its position wonderfully all through the financial crisis.

Port Townsend.

Trade and shipping.

The extensive failuresin Australia, principal market for lumber, the chief product of this district, and the financial stringency in the money markets of the United States has intensified the depression in trade and shipping referred to in my previous report. Outside of special orders, shipments to Australia are practically nil; several cargoes of lumber have gone forward to South Africa, as also Calcutta, which ports were only within this last few years added to the list of importers of Puget Sound lumber.

Freights.

To—	Per 1,000 Feet.	
	Highest.	Lowest.
	£ s. d.	£ s. d.
Sydney	1 10 0	1 7 6
Melbourne, Port Pirie, Adelaide ..	2 0 0	1 15 0
Calcutta	2 10 0	2 10 0
China	2 2 6	2 0 0
Africa, East London	3 0 0	2 15 0
West Coast, South America ..	2 0 0	1 15 0
United Kingdom	3 0 0	2 7 6

Towage.

The new tariff mentioned in last report has been maintained with excellent service by the Puget Sound Tug-Boat Company of this city, giving entire satisfaction to shipmasters.

Hydrographic office.

Has been permanently established here with office in custom-house; partial arrangements have been made for having time ball, which will be a further benefit to shipping.

Quarantine.

The United States steamer "Iroquois" has been dismantled and is now stationed at this harbour, a floating hospital for contagious diseases. The quarantine station at Diamond Point (outside entrance to this port) has been finished, and is now in charge of a quarantine officer.

Shipbuilding.

The iron ship-building yard at Everett has its first vessel, a steel whaleback steamer for coasting coal trade, in frame and plated, but suspended operations in June, and are still closed down. Work in wooden shipbuilding yards has been entirely stopped during the past year.

Steamship lines.

The Northern Pacific Steamship Line maintain a monthly service between Puget Sound, Japan, and Hong-Kong. The Great Northern Railroad Company chartered steamers to place on same route, but abandoned service after one trip, and are reported to have contracted for ships in England, specially built for the trade, and purpose starting service again during the coming summer.

Dry dock. The United States Navy Dry Dock at Port Orchard is now under construction and is expected to be ready for service by end of the year.

Fortifications. The Permanent Board of Engineers on Fortifications are reported to be due on the sound shortly, having in view the establishment of fortifications at Admiralty Head, Point Wilson, and Marrowstone Point, which points virtually control the entrance to the Puget Sound.

Coal. Indications have recently been discovered of extensive coal veins in close proximity to this place, on which work is being carried on by boring and making developments. The opinion of geologists is that it is a continuation of the veins of the celebrated Wellington and Nanaimo coals of British Columbia; one of the principal parties interested being a syndicate of capitalists from Victoria, Vancouver Island.

Cement. Stocks are large with poor demand, and selling price averaging less than 8*s*. 6*d*. per barrel.

Manufactures. As a result of dull times and money stringencies the nail and paper factories have been working only about quarter time. Nearly all lumber and iron manufactories in this district have been stopped during the past year, and prospects for the immediate future are not encouraging.

Fisheries. The fishing business of the Puget Sound is being extended each year. Most of the vessels employed in catching halibut off the banks at Cape Flattery land their fish here, where they are packed in ice and shipped to the interior States and east. This spring a couple of schooners are going to Alaska to fish for black cod. Salmon-parties are negotiating with a view to erect large canneries at Point Roberts, close to the dividing line between British Columbia and the United States; a location which, it is anticipated, will allow them to get a portion of the Frazer River salmon run—a fish much superior to that generally caught on the Sound. Parties claim to have recently discovered extensive oyster beds on the Hoods Canal.

Increase import trade. Shows an increase of 70,219*l*.; this is the result of increased transportation facilities and railroad connections for delivery of goods to eastern points.

Decrease export trade. Shows a decrease of 85,651*l*., the result principally of the decrease in lumber shipments.

Real estate. Has felt the full effect of bad times, and very few transfers of property have taken place during the past year.

Health The health of the city has been good with no infectious or contagious diseases.

Local and general. Port Townsend and vicinity having no agricultural or farming resources has felt the full effect of depression in shipping and manufacturing industries, resulting in great poverty amongst the working classes, of whom a large number have gone to the mining and farming districts in the eastern part of the State.

I append the several Annexes marked A, B, and C to show the commerce and trade in this collection district.

Annex A.—Return of all Shipping at the Port of Port Townsend during the Year 1893.

Entered.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	23	34,098	23	6,228	46	40,326
American	41	21,169	836	491,630	877	512,799
Norwegian and Swedish	4	6,155	...	..	4	6,155
Chilian	8	8,000	...	...	8	8,000
German	3	3,495	1	1,707	4	5,202
Nicaraguan ...	2	1,928	...	...	2	1,928
Ecuadorian... ...	1	778	...	...	1	778
Italian	1	1,157	...	...	1	1,157
Total	83	76,780	860	499,565	943	576,345
,, for the year preceding ...	149	136,620	1,040	679,474	1,189	816,094

Cleared.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons
British	21	27,484	21	4,442	42	31,926
American	53	23,279	823	473,965	876	497,244
Norwegian and Swedish	4	6,155	...	...	4	6,155
Chilian	10	10,255	...	...	10	10,255
German	4	5,186	1	1,707	5	6,893
Nicaraguan... ...	2	1,928	...	...	2	1,928
Ecuadorian... ...	1	778	...	...	1	778
Italian	1	1,157	...	...	1	1,157
Total	96	76,222	845	480,114	941	556,336
,, for the year preceding ...	183	172,869	1,089	684,471	1,272	857,340

Annex B.—Return of Principal Articles of Export from Port Townsend during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Flour	Barrels ...	...	...	7,253	5,719
Timber...	Feet ...	74,374,000	124,732	119,210,000	194,970
Iron, and manufactures of ...	...	...	23,261	...	22,400
Oils	...	...	12,125	...	10,577
Furs and hides	...	...	11,911	...	9,600
Provisions (meats)	...	...	19,022	...	15,436
Cattle	...	...	21,960	...	15,527
Liquors and wines	...	...	1,316	...	3,080
Wool, and manufactures of	...	...	4,001	...	10,603
Cotton	...	...	5,412	...	5,772
Fish	...	...	1,134	...	1,935
Tinned fruits and vegetables	...	...	9,164	...	6,891
Other articles	...	...	83,839	...	101,018
Total...	...	...	317,877	...	403,528

RETURN of Principal Articles of Import to Port Townsend during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Cement	Tons	6,206	14,[illegible]	[illegible]	437
Coal	,,	3,468	[illegible]	13,322	10,489
Iron, and manufactures of ...	..		1,[illegible]	...	[illegible]
Steel wire rods	Tons ...	1,510	[illegible]	2,[illegible]	18,[illegible]
Tin-plates	,, ...		1,[illegible]	5	105
Lead	,, ...	...	[illegible]	66	1,[illegible]
Zinc	...	...	[illegible]	...	...
Jute	...	...	4,[illegible]	...	...
Sugar	...	...	37,[illegible]	...	[illegible]
Rice		...	[illegible]	...	[illegible]
Tea	...	...	1,[illegible]	...	...
Silk	...	...	[illegible]	...	445
Other articles...	...	...	[illegible]	...	14,[illegible]
Total...		...	119,513	...	49,294

Annex C.—TABLE showing Total Value of all Articles Exported from and Imported to Port Townsend from and to Foreign Countries during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	2,340	12,143	17,413	4,845
British Columbia and Canada	186,667	185,686	54,082	8,762
Australia	19,176	65,847	..	..
France	..	..	281	52
Belgium	1,337	..	10,944	18,892
Hawaiian Islands ..	17,745	21,811	1,266	140
Chile	33,458	61,[illegible]	126	..
China	1,556	[illegible]	10,[illegible]	103
Peru	15,525	18,174	..	..
Mexico	11,939	21,689	..	..
Brazil	..	1,900	..	..
Japan	609	526	12,945	6,455
Africa	5,913	2,190	..	..
Germany	2,909	1,255	214	1,030
India	2,738	1,724	11,247	8,892
Norway	..	1,200	..	..
Netherlands	..	4,421	..	..
Guatemala	1,486	..	..	..
New Caledonia	3,440	..	..	..
Argentine Republic ..	1,675	..	..	..
Fiji Islands	1,482	..	..	..
Other countries ..	5,732	2,332	730	153
Total	317,877	403,528	119,513	49,294

Los Angeles.

Mr. Vice-Consul Mortimer reports as follows:—

In previous reports I have expressed an opinion as to the probabilities of increased prosperity, or otherwise, in the then immediate future. At the present time I am at a loss to express an opinion on the probable course of affairs for the next 12 months, owing to the fact that the indications which point to increased prosperity are balanced, possibly overbalanced, by those which point to a continuance of the inactivity in business and "hard times," from which the whole country is suffering. The bank clearances of the principal cities of the United States are telegraphed weekly by the associated Press, and I see by these reports that for many months past Los Angeles has been nearly every week at the head of the list in percentage of increase on the corresponding week of 1892, and this in face of a decrease of from 30 per cent. to 40 per cent. in most of the other cities in the country. The Los Angeles clearing-house reports clearings as follows:— Introductory remarks.

Year.	Value.
	£
1892	7,712,000
1893	8,920,000

In the 5 months preceding the financial panic in June the increase was 38 per cent. on the corresponding 5 months of 1892.

The County Assessor writes me that his assessment of the value of all taxable property in the city and county of Los Angeles for the last 2 years was as follows:—

Year.	Value.
	£
1892	14,813,927
1893	15,454,920

Building operations continue as actively as in previous years, and transactions in real estate are as numerous and at good prices. On the other hand the condition of the country generally is unsettled, and some local conditions are unfavourable; we are face to face with the calamity known here as a "dry year," that is, insufficient rainfall to make good crops; the orange crop has suffered to an unprecedented extent from frost. The prices for fruit generally are unremunerative, and the protective tariff on oranges and other fruits and wines is likely to be reduced. I have great faith in the future of this city and districts however,

and do not anticipate that the unfavourable conditions to which I have referred will affect business here for more than a year or two. Three undertakings are under discussion here, all likely to be accomplished in a few years, and the completion of all of which will make Los Angeles the chief city and centre of business for the Pacific Coast. The undertakings to which I refer are the construction of a good harbour for Los Angeles by the United States Government, the completion of the Nicaragua Canal, and the construction of a railway to Salt Lake City. The latter will give Los Angeles a third competing transcontinental railway, whereas the other cities on the Pacific Coast have but one each; it will also ensure a supply of cheap fuel, and will make a very large territory to the north-east, tributary to this district. A good harbour will give Los Angeles the oriental trade, owing in part to the fact that the easy grades and freedom from snow blockades on the transcontinental lines centering here give them an advantage over other transcontinental railways estimated to be equivalent to a haul of 800 miles, and lastly, the completion of the Nicaragua Canal will open new markets for the productions of this district.

General Remarks.

Advice to British capitalists.

The investments of British capital in this district which have proved remunerative have invariably commenced in a small way, and developed gradually. In every instance when a big "going concern" was purchased, it has either been ruined by bad management, or purchased at three or four times its value, or both, and so proved unremunerative. The explanation, no doubt, is that a big "going concern" in the shape of a worked-out mine or something of that sort is more profitable to the promoters than the formation of a mortgage company, or the purchase for a nominal sum of an undeveloped mine. There is a good deal of activity at Vanderbilt, the present terminus of the proposed railway to Salt Lake City, and other mining camps, and there will be many opportunities for profitable investment in mining properties, when the construction of that railway is well under way. As I have stated in former reports, however, English agents seeking mining investments would be much more successful if they purchased undeveloped mines, which can often be obtained for a trifling sum, and expend money in developing them, instead of investing enormous sums in the purchase of "going concerns" which are too often worked out. It has been stated on, I believe, good authority, that English investments in the States, west of the Missouri River, do not return 1 per cent. per annum. I hesitate to give an estimate of the returns from English companies in this district. Bad selections of investments, bad management, investments in watered stock of legitimate enterprises, every error in fact that it was possible to make has been made by English investors here, and this in face of the fact that many millions can be safely invested here in really good legitimate paying enterprises.

The Bear Valley Water Company, a very large concern in which English capital is heavily interested, has just gone into the hands of a receiver. The Press here attributes its failure to mismanagement, which is probably the explanation of the matter, as the business is of such a nature that it ought to pay better than any other industrial enterprise.

The best investments.

City and county bonds payable in gold, first mortgages on good real property, and the bonds of legitimate enterprises are the safest, and for English investors the best investments in this district. For further information as to these investments I refer to my report for 1892. It is well understood here that English investors are, as a rule, ignorant of business. A local paper commenting on the gullibility of English shareholders in joint stock companies points out that they are generally "worked" through the medium of promoters, and that they can always be "worked" if they can be induced to act on their own judgment.

Advice to emigrants.

The people in this district are extremely energetic in advertising the attractions of Southern California, to induce emigrants to settle here. Hundreds of thousands of books and pamphlets issued by or under the direction of the Los Angeles Chamber of Commerce were distributed at the World's Fair at Chicago, with the result that notwithstanding the financial panic emigrants continue to come to Southern California from all parts of the United States. If, as is alleged, Southern California is suffering, and in the immediate future is likely to suffer more, from over-production of fruit, the arrival of hordes of embryo fruit farmers must aggravate the evil, and may result in the development of the country when the fruit growers are forced to turn to other industries. The expenditure of the large sums used in advertising Southern California would be explicable did it result in attracting here rich farmers only; for one rich farmer, however, there are a dozen others who are soon in direct competition with many of those who contributed money to induce them to come here, and who are now suffering from the competition their presence causes.

Owing partly to over-production, partly to lack of organisation in marketing the products of the orchards, and partly to other causes, fruit growing has not been profitable for the last two seasons, and many orchards are likely to be for sale at less than the price paid for the naked land a few years ago. The next two or three years will, therefore, be the opportunity of those who think that over-production will regulate itself by the expansion of existing markets and the acquisition of new ones, and who, therefore, desire to invest in orchard property. New comers should bear in mind that if they invest in land here before leaving England or immediately upon their arrival here they will almost certainly be imposed upon. They should spend at least a year in acquiring such information as will enable them to form an opinion for themselves on the prospects for success in fruit culture, and they will be infinitely more successful if they rent land for a year or two before buying. In Merced county the

Southern Pacific Company is offering a large body of irrigated land for sale at 15*l.* to 20*l.* per acre, interest only to be paid for the first 7 years, and the principal in small instalments thereafter. I do not know anything about the merits of this particular tract of land, and only mention the matter to show the easy terms on which land can now be acquired in California.

There is but little manufacturing in this district owing principally to dear money, dear labour, and dear fuel. The raw materials are here, railway freight charges are being reduced, and are likely to be further reduced by further competition in the shape of a new transcontinental railway. Capital is now becoming abundant, and labour is fast coming to the level of the Eastern States. Hundreds of men, for many weeks past, have been working for 4*s.* per day, the lowest wage ever paid here, and many hundreds of the unemployed have been working for their board.

United States Industrial Army

Unemployed men who have congregated in this city in the past 6 months to the number of upwards of 700, organised the "United States Industrial Army," and have started for Washington, D.C., on goods trains, of which they took forcible possession, to present petitions to Congress for the enactment of laws embodying the following principles:—

1. Government employment for all unemployed citizens.
2. The prohibition of foreign immigration for 10 years.
3. That no alien be allowed to own real estate in the United States.

The movement is spreading to other cities and may result in the appearance at Washington of a large body of unemployed men.

Cost of government.

The Citizens' League, an organisation formed to promote economy in local government, reports that the cost of government in the city and county of Los Angeles amounted in the year 1892 to 538,399*l.* It is stated that this amount exceeds the cost of carrying on the State government in 29 out of the 44 States of the Union, and that the cost of carrying on the government in the States of Colorado, Delaware, Montana, Nevada, Wyoming, and North Dakota combined was less than this amount by 5,055*l.* The tax rate for State and county and city taxes on all property in the city of Los Angeles last year was a little in excess of 2½ per cent. This rate was payable on money in bank, watches, jewellery, and in fact all property.

Whittier Reform School

In my last two reports I gave at some length particulars about a reform school for juvenile offenders recently established at Whittier, about 8 miles from this city. The treatment of the inmates is so entirely different from anything heretofore attempted in the reformation of young criminals that I venture to give the following additional particulars.

In the summer the inmates are taken for a holiday to Catalina Island where they camp for several weeks and are allowed to attend public balls at the hotel. They are spoken of in the Press as the "Whittier Cadets," and are constantly invited to take part

in public processions, as on July 4, and other entertainments. They are treated with the greatest kindness, are taught a trade, and in the evening play games, sing, and otherwise amuse themselves.

The expense of maintaining this institution is 5*l.* per month for each inmate, exclusive of the loss of interest on the value of the building and plant. It is unquestionably proving a great success in making good citizens out of boys who would otherwise have become criminals, and might with advantage be imitated in England, if the cost of carrying it on, in excess of the ordinary cost of reformatories, could be obtained by voluntary contributions. It is alleged that some parents charge their children with misconduct in order to have them committed to this institution for a term of years. The inmates have better food, clothing, and education than thousands of boys who labour under the apparent disadvantage of being poor but honest.

Public library.

This city possesses the best public library on the Pacific Coast. It contains upwards of 34,000 books, and is free to all residents of the city who can borrow books for use in their own homes without charge. The income for the support of this library is derived from an annual tax levy on all taxable property in the city, not to exceed 1*s.* on each 100*l.* of all real and personal property. The income last year was 4,000*l.* The record of books used in 1893 shows the following results :—

	Volumes.
Fiction and periodicals	294,516
All other books	92,743
Total	387,259

In 1891 statistics were compiled showing the authors whose books were most in demand that year as follows:—Miss Alcott, E. P. Roe, W. T. Adams, Captain King, G. A. Henty, W. Besant, Charles Dickens, Sir Walter Scott, and F. Stockton.

The report of the librarian for 1893 does not show the most popular authors. The number of registered borrowers, that is persons who take books for home use, is 13,495. This is about one-fifth of the total population of the city.

Retired Indian officers.

My attention has been called to an editorial in the "Englishman" of Calcutta, discussing the advisability of retired Indian officers settling in Los Angeles, and commenting on the large profits in fruit culture. Apart from any other considerations the difficulty about servants makes it inadvisable for English officers, more especially officers who have been accustomed to servants in India, to settle here. A good general servant, called "help" here, is paid 5*l.* to 6*l.* per month, and with board and what she breaks and wastes, costs about 10*l.* per month. Chinese servants are not any cheaper. Comparatively few people can afford more

than one, and many of those who can afford two employ only one. The question of profits in fruit culture is discussed elsewhere in this report.

Shipping and Navigation.

As stated in my last report, the port of Wilmington has been abolished by Act of Congress, and the collector of customs now resides in this city. The Secretary of the Treasury has designated San Pedro, Redondo, and Port Los Angeles as ports where vessels may enter and clear, and deputy collectors reside at these ports. Formerly foreign-going vessels for Los Angeles entered at San Pedro, and discharged and received cargo by lighters. Wharves have now been constructed at Redondo and Port Los Angeles, and in good weather the largest vessels can discharge alongside these wharves. At Port Los Angeles, 16 miles west of this city, the Southern Pacific Company has constructed a wharf nearly 7,000 feet long and 130 feet wide, at a cost of 200,000*l.* A vessel of 2,926 tons, drawing 24 feet, recently discharged at this wharf. The British ship "Amulree" also discharged at this wharf. Several British ships have discharged at the wharf at Redondo 22 miles south-west of this city, and others continue to go to the old port, San Pedro, 21 miles south of Los Angeles. Officers of the United States Corps of Engineers have on three different occasions examined these ports, and have all reported to Congress that San Pedro offered greater advantages than the other ports for a deep-water harbour. The general manager of the Southern Pacific Company writes me that in the last 26 years his company has expended upwards of 200,000*l.* at San Pedro, and that they are now abandoning San Pedro "for the sole reason that Port Los Angeles was discovered to be a much superior place for a harbour." A breakwater at either San Pedro or Port Los Angeles will cost a very large sum of money, and it is not probable that Congress will make an appropriation at present for either place, owing to the dispute as to which is the more eligible site for a deep-water harbour. I find that large vessels discharged and received cargo at the wharf at Port Los Angeles during a severe storm which prevailed here in February last, that substantial moorings have been placed on both sides of the wharf, and that a board of San Francisco underwriters examined and approved these arrangements for the safety of sailing vessels using the wharf. The position of Port Los Angeles (Santa Monica), Redondo, and San Pedro is shown on a map accompanying my report for 1889.

Casualties.

The British ship "King James," laden with 3,600 tons of Wallsend coals, from New South Wales, was abandoned at sea on fire, the coals having ignited spontaneously. The crew landed at Santa Barbara with the loss of 11 men. The only previous case of the spontaneous ignition of Australian coal was that of the cargo of the British ship "Old Kensington," which vessel arrived at

the port in 1889 on fire. I commented on the matter in my report for that year. The British ship "Gosford," laden with 3,500 tons of coals from Liverpool, was beached near Santa Barbara, the coals having ignited spontaneously some days previously. The vessel and cargo became a total loss.

I have been unable to obtain from the collector of customs a return of the shipping at the ports for Los Angeles for the year 1893.

Trade and Commerce.

The wine trade in this district is in a very unsettled condition. The sweet wines and brandies produced here are not adapted to the English market, and the demand for them in the Eastern States, where they are better appreciated, is very poor at present, owing partly to the uncertainty as to the alterations to be made in the tariff. Wine manufacturers here tell me that the proposed reduction in the duties on wine, and the change from a specific to an ad valorem duty, will render it impossible for manufacturers of pure California wine to compete in the Eastern States with spurious wines imported from Europe. The prices now being realised in New York are not remunerative, and this notwithstanding the fact that the freight to New York (1½*d.* per gallon) is unremunerative to the railways. Wine.

I have had enquiry from two parties for the names of English manufacturers of brass and metal bedsteads and other ironwork. One large furniture company here wishes to try the experiment of importing these articles. Metal bedsteads.

The manager of the Southern California Packing Company writes me that his company packed 1,400,000 cans of fruit of 2½ lbs. each in 1893, and that the total pack of this district was about 2,800,000 cans. Canned fruit.

The shipment of oranges from this district in 1893 amounted to 67,910 tons. The shipment this year, owing to heavy losses by frost and wind storms, will not probably exceed 20,000 tons. The question of over-production is treated elsewhere in this report. Oranges.

I wrote to Mr. Menzies, editor of "The Commercial Bulletin" of this city, asking his views on the present state of trade here, and the prospects for increased trade with Great Britain. His reply was so exhaustive and accurate that I give it in full as follows:— Prospects of trade with Great Britain.

"During the last 12 months the trade of this city has been perfectly steady, a condition that may well be deemed remarkable considering that within the same period the United States has experienced a financial crisis of exceptional severity, from whose effects its industries are still prostrated. Los Angeles meanwhile has unquestionably progressed, thanks to the amenity of its climate and to its commanding position as a local capital.

"The panic reached us in June, and for 2 days or 3 days raged wildly. Several of our banks were obliged to suspend Banking.

temporarily, though by no means all of them, as has been elsewhere stated. The causes, as already implied, were national and not local, though the first impetus was given by the failure of two unsound institutions, one in the city, the other at Riverside. With a few exceptions the suspended banks proved to be perfectly solvent, and resumed business after a short delay. Without doubt the system of banking here, viz., that of small independent banks, which is also general throughout the United States, lends itself readily to the production of crises of this description, and it is generally admitted that for the sake of economical working and financial stability, as well as in the public interest, the numerous banks that we now have ought to consolidate into one or two banking concerns of large capital, with branches in the smaller places, according to the system approved in other parts of the world. The difficulty in the way of this sensible arrangement is that all existing directors and managers wish to retain their posts and the remuneration that enables them to live in this desirable climate. Economic forces, however, are too strong to permit of the continuation of the present unstable and costly system, and the consolidation in question is already actually in progress by the retirement of two of our city banks, one of them, the Bank of America, the longest established but one, and an exceedingly strong and conservative institution.

Commercial.

"The commercial houses of the city were scarcely affected by the financial panic, and continued without intermission a striking testimony to the solidity of the place. Changes, however, have occurred amongst them owing to other causes. One of the large wholesale grocery concerns has discontinued, leaving at the moment but the two older firms, both of which possess very large capital, in the field. Two of our large fruit shippers have also in the meantime gone into insolvency. These however are continuing, though on a smaller scale, under fresh organisations, their previous businesses. The fruit trade is extremely speculative in its character and exposed to much uncertainty and contention. It necessitates the employment of a large capital, of an army of local assistants, and of agents in every portion of the United States. Working expenses are tremendous, toil unceasing and profit precarious; yet in the face of the continually occurring disasters amongst them it is publicly represented that the firms engaged in this business are reaping undue profits, an agitation inspired without doubt by the real estate interests, with the object of inducing strangers to believe that the profits of fruit growing would be much larger if the sale of the products were managed as it ought to be. So far as the foreign trade is concerned we have reason to congratulate ourselves upon the acquisition of increased facilities. Until something more than a year ago there was but one firm of considerable importance engaged in this branch of commerce in Southern California, and the real estate interests of this firm induced it to divert the business to San Diego. In the meantime, however, there has been established here under the charge of a thoroughly

competent agent a branch of another extensive firm, which has considerably increased the foreign trade of this portion of the State, both import and export, and without doubt will do so still more.

Freights. "While the development of our industries is still in its infancy, the growth of our foreign relations is necessarily hampered by the scarcity of direct opportunities of exchange. For shipment to Australasia or the Orient our products must first be sent to San Francisco, a distance of nearly 500 miles, and there reshipped, and the same of course applies to imports. Besides this, direct trade with England has during the last 12 months been hindered by the low prevailing rates of freight to New York, established by the railroads with the object of killing off competition viâ the Isthmus of Panama, which has been maintained in the interest of the trade of their city, at considerable cost, by an association of San Francisco merchants. Barley, for instance, has been carried from Santa Ana, a point about 30 miles from here, viâ New Orleans to New York for 1*s.* 3*d.* per 100 lbs., which is much more advantageous than shipment by direct vessel to England, besides providing the option of an alternative market in the United States. It seems probable at this writing that the opposition of the merchants viâ the Isthmus will cease and that freights to the East may advance, so soon as a passenger rate war now in progress between the railroads is settled.

Imports. "The contemplated reductions in the United States tariff will, if put in force, unquestionably improve this department of business, though how far or in what lines it would be premature at present to discuss. Meanwhile it may be of interest to note that American tin-plate has found its way here. The consumption, however, is not important, being only for roofing.

Sugar. "It is now generally admitted that the bounty on the domestic production of this article will not be continued; but it is understood on the other hand that an import duty on foreign, except the Hawaiian which is free under the existing reciprocity treaty, must be imposed to meet the financial necessities of the Government, and that thus a measure of protection is ensured to the industry. The production of the Chino factory, the only one as yet in Southern California, will be raised to the capacity of handling 1,000 tons of beets daily during the coming season, and it is reported that another will be erected at Anaheim, 27 miles from here, in a fine agricultural country.

"Local consumption is chiefly supplied from the refinery at San Francisco controlled by the Sugar Trust, where also the product of the Chino factory has for the last 2 years been sent to be refined. It is now given out that this latter will in future be refined at the point of production and applied directly to the consumption of Southern California. Three years ago the quality of the refined article produced in this way did not give satisfaction; but it is understood that an improvement will be made. In spite of the import duty of $\frac{1}{4}d.$ per lb. a certain amount of granulated sugar is imported into San Francisco from Hong-

Kong, a portion of which finds its way down here. It cannot be used by the wholesale trade, which requires various qualities which can only be had from the Sugar Trust, and that Trust will only supply all or none.

"A confectionery manufacturer in San Francisco also imports regularly German beet sugar viâ Cape Horn. None of that has yet come here; but while a reduction in the differential duty on the refined article might facilitate imports, yet during the currency of the Hawaiian treaty the San Francisco refinery, being able to import its raw material free, will probably command the market.

Hogs. "The Cudahy Packing House here which is capable of handling 500 hogs daily, and is understood to be packing nearly half that number or more, has given quite an impetus to the raising of these animals. We still import the bulk of our supplies of hams, bacon, lard, &c., from the East, and probably will continue to do so for a long time. We have one extensive establishment for smoking eastern meats, and the erection of another is at present the subject of negotiation.

"*Exports.*

Grain. "The yield of last year proved fully up to expectation. During the current season there have been shipped from Hueneme, a port in this district, to San Francisco, for local use and re-shipment, about 24,000 tons of barley, 3,000 tons of wheat, and 2,000 tons of corn. From the four ports of Los Angeles and Orange counties (Port Los Angeles, Redondo, San Pedro and Newport) there have been shipped to the same destination about 37,000 tons of barley, 5,000 tons of wheat, and 8,000 tons of corn; two cargoes of wheat have gone abroad from San Pedro, and 5,000 tons of barley overland to New York, chiefly from Orange county. Stocks remaining are still liberal for the season of the year, and the outward movement continues.

"This year, on the contrary, the rainfall has been very deficient, in fact up to date but about half of an average, and the surplus for shipment, if any, will probably be small. In the Antelope valley, in the northern portion of this county, there has been a compensatory precipitation of snow, which, if rain falls later, may enable a crop to be secured; but the export from that locality has hitherto been made from San Francisco.

"The approximate prices realised for this year's crop were 4*l.* for wheat and 3*l.* for barley and corn per ton of 2,000 lbs. f.o.b.

Oranges. "The crop on the trees this year was estimated at about 6,500 carloads of 300 70-lb. boxes; but a considerable proportion of the Riverside yield, which is about one half of the whole, was destroyed by severe frosts early in January. The market has been completely demoralised, on the one hand, by the depression of trade throughout the Union and the enormous crop of Florida

fruit, which ripens fully a month earlier than ours, and this takes precedence of it; and on the other, by the action of the exchanges (combinations of growers formed with the idea of dispensing with the fruit shippers and of obtaining better prices for the fruit), in selling the fruit by auction at most loading points on ruinous conditions. Indications at present are that these organisations may shortly dissolve, and that the business will return to its accustomed channels, but whether they do so, or manage to live through the season, the year's business is bound to prove a wretched one, and very little return will be obtained for any of the fruit except that portion which has been sold independently of the exchanges, which includes that of the preferred Redlands and Highlands districts. It is anticipated that the shipments will not exceed 2,500 to 3,000 carloads; the balance, beyond what is locally consumed, will be wasted. There seems no probability of shipments to England this year, advices from Liverpool holding out no certainty of more than 8*s*. or 10*s*. per box being realised there, which prices, after deducting cost of transportation, &c., would leave nothing for the grower.

Lemons.

"This business continues to develop, though under rather discouraging circumstances. A few months back, in consequence of the quarantine against cholera having impeded the import of Sicilian fruit, good prices were realised, and stocks were mostly disposed of; but now that Sicilian fruit is coming in quite freely the market has all gone to pieces. Recently there were equal to 1,000 carloads afloat from Sicily for Atlantic and Gulf ports, and a very heavy movement still continues. California lemons have been selling by auction in San Francisco at from 7*s*. to 8*s*. per box, while Sicilian, in great part probably owing to prejudice, fetch twice as much there.

"Other fresh fruits, such as apricots, peaches, pears, and grapes, sell for the most part only locally. It has been expected that a shipping business to the Eastern States will be developed in this line; but the Northern and Central portions of the State do it better than we can, and they made no money last year out of enormous shipments. This branch of the business depends on the success or failure of the fruit crop in the Eastern States. Prospects this year are for an abundant yield in this State and a relative failure in several Eastern States, thus promising us a good market.

Dried fruits.

"Here in Southern California we dry our apricots and peaches to greater relative advantage, having more sun and less fog than in the more northerly portions of the State. This product has gone fairly well this year, in spite of most discouraging conditions.

Raisins.

"Nothing could be worse than the conditions of this industry. Most sales have not realised the costs of gathering and curing, many of them not half of it. The production is ridiculously excessive, and the competition of Greek currants admitted free of duty and selling in New York as low as $\frac{3}{4}d$. per lb. with trade in the poor state it has been, has contributed to the unfortunate result. The future looks black.

Prunes. "Prunes are not an important item in Southern California. Ordinary sizes have been selling at 1½*d.* to 1¾*d.* per lb., and as the production in the northern part of the State is increasing very rapidly, there seems no prospect of it.

Olives and olive-oil. "Olives and olive oil are articles of steadily increasing production here. All hitherto produced sell fairly well, though authorities differ as to commercial results. The supply of both fruit and oil is still chiefly imported even for local consumption, and the condition of the industry as yet is scarcely more than experimental.

Fruit-canning. "Fruit canning is restricted here. The product of the northern canneries, restricted as it was last year, is not realising cost, probably the coming season will see it still further curtailed. Tomatoes have sold well and have been largely shipped to the Eastern States, in consequence of a relative failure there accompanied by low freight rates.

Nuts. "The walnut crop was a pretty good one, probably 100 carloads, and has been sold at 3½*d.* down to 2½*d.* per lb. The peanut or ground-nut is an article that is also produced with a measure of success here. It sells at about 1½*d.* per lb.

Honey. "The last crop was abundant and prices are low, but the sale is poor. Extracted is quoted in carloads put up in cases of two, 60 lb. cans each, at 2⅛*d.* to 2¼*d.* per lb., and comb at 4*d.* to 5½*d.* The dulness of the trade is attributed to the general production of the article throughout the world, to its being a luxury not in large every day use, to adulteration, and to the low prices of sugar and sugar syrups.

Dried beans. "The crop of Southern California, raised in Los Angeles, Ventura, and Santa Barbara counties, was a good average one, say 20,000 tons, and is selling at somewhat over 1*d.* per lb. on the average. A large quantity is now being also raised in the northern coast counties and on the Sacramento River, the latter of second rate quality and cheaper

Fresh vegetables. "Potatoes, cabbage, cauliflower, and now also celery are largely raised for shipment east. For this trade prices have to be extremely low, and cultivation is chiefly in the hands of Chinese, as white farmers as a rule do not find it remunerative. The Chinese also are more prompt and reliable as a rule in their dealings with the shippers.

Petroleum. "The production of asphalt has increased since last year by 200 per cent. New uses are being constantly discovered for it as well as new markets, and it seems destined to supply the United States and in a measure the world. The yield of oil on the other hand is limited and is all absorbed locally.

"The reader of the foregoing summary will be able to form a tolerably accurate judgment concerning the prospects of this country. It appears that some leading staples have reached their extreme development, or exceeded it for the time being, though there is still room for growth in others and in various minor lines.

"I do not myself believe that there is any further boom in

prospect here. Commercial business generally is very actively competent."

Messrs. W. P. Fuller and Company, the principal importing house here, write me as follows:—"We are importing but very few goods to Los Angeles direct from England, most of our English importations are made by our San Francisco house. What glass and cement we import comes direct from Belgium." Glass and cement.

I have been unable to obtain from the collector of customs a statement of the imports and exports. The bulk of the imports consumed here are entered at San Francisco and San Diego.

Population and Industries.

The population of this city has increased from 51,000 in 1890 to about 70,000.

There were 954 deaths in this city during the year, which gives a death-rate of 14·61 per 1,000. Nearly a fourth of these deaths were due to consumption contracted elsewhere, and 150 were the subjects of coroners' inquests. The births numbered 1,002 besides 78 still-births. The death-rate is based on an estimated population of 65,000. Health.

The superintendent of buildings reports the issue of building permits in this city as follows. For 1892, 380,000*l.*; 1893, 330,000*l.*; The actual amount expended in building for the years specified is considerably in excess of these figures. New buildings.

In the first 6 months of 1893 the considerations named in all deeds filed with the county recorder exceeded the amount for the corresponding 6 months of 1892 by 400,000*l.* In the second half of the year there was some decrease on the figures for the second half of 1892. The total for the year was 3,100,000*l.* Transfers of real property.

There are nearly 100 miles of street railway track within the city limits of Los Angeles, operated principally by electricity and cable, and carrying about 12,000,000 passengers per annum. Street railways.

The county clerks of Los Angeles and San Bernardino counties give me the following statistics as to the number of divorces applied for, and the number of decrees of divorce granted in their respective counties in the last 2 years, as follows:— Divorce.

	Divorces Applied for.		Divorces Granted.	
	1892.	1893.	1892.	1893.
	Number.	Number.	Number.	Number.
Los Angeles	239	291	180	209
San Bernardino ..	42	51	26	25

I have not received statistics on this subject from the other counties in this district.

Sewers. A 40-inch sewer was constructed in 1893 from Los Angeles to the ocean, a distance of about 12½ miles, at a cost of about 75,000*l.* In addition to this amount, upwards of 60,000*l.* was expended in sewers and street improvements in this city during the year.

Movement of trains. Two trans-continental railways and one local railway run to Los Angeles, moving 140 trains per day.

Borax. In my report for 1890 I stated that borax is found in practically unlimited quantities in this district, that the average price at the factories was 28*l.* per ton; that the cost of manufacture does not exceed 7*l.* per ton; that the borax fields are in few hands; and that the price is kept up by limiting the output. The borax companies are reticent about imparting information as to the output and cost of production, one company frankly writing me that, "it would be giving the inside facts of our business away, and that would not be good business policy on our part." The price now is 26*l.* per ton at point of shipment.

Oil. The output of oil in this district is estimated to be 1,200 barrels a day.

Public lands. I make the following extracts from the last report of the register of the United States Land Office in this city. The area of lands in this district is about 24,000,000 acres, of which in round numbers 6,300,000 are surveyed and open to entry, 5,600,000 are unsurveyed and not open to entry, 1,300,000 are included in the forest reserves, and the remainder of the area is covered by railway and private land grants. 67,000 acres were entered and otherwise disposed of during the fiscal year ended June 30, 1893.

Liquor traffic. In 1886 the population of this city was about 40,000, the public-house license was 2*l.* per month, and there were 200 public houses. In 1893 the population was about 70,000, the public-house license was 10*l.* per month, and there were 165 public-houses. At Pomona, a small town in this district, the public-house license is 200*l.* per annum payable in advance, and the conduct of the business is regulated by an ordinance of the Board of Trustees containing the following somewhat onerous conditions:—

"Sec. 5. All spirituous, vinous, malt or mixed liquors sold or given away under the provisions of this ordinance, shall be dispensed in a single room, fronting on a street and on the ground floor, and not in any basement, which room shall not contain any card, billiard and pool table, or any bench, chair or seat of any kind, save and except one chair for the use of the licensee or his employés, which chair or seat shall be used only by such persons. The front of said room shall contain windows which shall occupy at least one-half of said frontage and contain clear, plain glass, which shall extend to within at least 3 feet of the floor and ceiling, and be set in frames of the ordinary kind and pattern used in business buildings; and no change shall be made in the front or interior of said room after said license is issued without the consent of the Board of Trustees. No curtain,

screen, frosting, paint, ground glass, coating or any other obstruction or device of any kind whatever, shall be placed or kept before, over, in or upon any window of such room, but at all times the interior of such room and every part thereof, shall be exposed to the plain view from the street on which it fronts. Such room shall not be connected with any other room by any door, opening, or passage whatever. No game or device of any kind shall be played, or permitted or allowed to be played, in any such room where such liquors are dispensed, or in any room under the control of the licensee or his employés, adjacent thereto."

Mr. Fred J. Smith, the agent at Pomona of an English mortgage company writes me with reference to this ordinance as follows:—"The High License Ordinance is being strictly enforced, and all the restrictions in regard to chairs, tables, back rooms, screens and time of closing are fully observed to the great benefit of the saloon business, and the happiness of the people generally. Indeed, this business as at present conducted is about as decent and orderly as any other on the street."

Electricity.

In my last report I referred to the operations of the San Antonio Electric Light and Power Company, stating that it was intended to convey the current to Pomona a distance of 15 miles, and to San Bernardino 30 miles, to be used for light and power purposes. As the length of the circuit is greater than has been heretofore attempted in this country, I give the following particulars kindly supplied to me by Mr. Burt, the secretary of the company. "The water is diverted from the stream through a tunnel 1,300 feet long, then taken into a 30-inch pipe and conveyed 2,000 feet to the power house to Pelton water wheels under a head of 410 feet. The dynamos are Westinghouse alternators each of 120 K. W. (160 horse-power), and each connected directly to the shaft of the water wheels.

"The dynamos generate the current with a potential of 1,000 volts, whence it (the electric current) is carried through a series of 20 'step-up' transformers and delivered to the main wires under a potential of 10,000 volts. This high voltage enables the current to be transmitted to Pomona and San Bernardino over a wire, the diameter of which is only one-seventh of an inch. At the sub-stations at Pomona and San Bernardino the high voltage is transformed again to 1,000 volts through a bank of transformers, the same as those at the power station only connected up in the reverse order. From the sub-stations the current is transmitted through the cities in the same way as electricity is distributed from any central station.

"The operation of the plant both electrically and financially during the past year and one-half has proved eminently satisfactory, so much so that we are increasing the electrical capacity of our plant in the same way as the original."

Glass company.

The Los Angeles Glass Company, with a capital of 30,000*l.*, purposes manufacturing glass here, silicious sand can be obtained at various places convenient to the site of the proposed factory; the soda ash, however, must be procured from England, as none

is produced in this country. It is estimated that soda ash can be laid down here at 6*s.* per 100 lbs. The glassware used here is imported from England and the Eastern States, and it is alleged by the promoters of this company that the carriage and breakage in transit more than counterbalances the higher price paid here for labour and fuel.

Beet sugar.

For several years past I have commented on the increased culture of the beet in this district for the manufacture of sugar, pointing out that land contiguous to the sugar factory at Chino is offered for rent in small or large tracts, and that English farmers coming here to settle would be wise to rent land here for a year or two before purchasing. Mr. Gird the proprietor of the Chino Ranch writes me as follows:—

"Total product of sugar at Chino, 1892, was 7,903,541 lbs.; in 1893, was 15,100,000 lbs.

"The total product of sugar in the United States for the fiscal year ending June, 1893, was, cane, 450,633,915 lbs.; beet, 27,083,288 lbs.; sorghum, 1,014,450 lbs.; maple, 3,393,428 lbs. Total for the fiscal year of 1893, 482,125,081 lbs. Total production of beet sugar in California for 1893, 35,088,969 lbs.

"The estimated product at Chino for 1894 is 25,000,000 lbs. The sugar beet industry has proved to be the most sure and satisfactory agricultural proposition in California to-day.

"Congress has taken the bounty off sugar and foreign sugar is admitted free, but I am pretty well assured that the Senate will not pass the Wilson Bill as sent up by Congress, and will impose a tariff on foreign sugar of $\frac{1}{2}d.$ to $\frac{3}{4}d.$ per lb. The bounty will, I think, be taken off except to those factories that were built under the provisions of the McKinley Act, which, of course, have still 12 years of bounty to run under.

"Last year nearly 5,000 acres were put into sugar beets on the Chino Ranch, of which 2,000 acres were under the third year's cultivation to beets, 1,000 two year's, and 1,000 was sod-land broken up for the first time, and of which very few of the beets were raised for sugar, so that 4,000 acres produced the 45,000 tons of beets that went into the factory; the 2,000 acres in beets for the third time produced an average of 18 tons to the acre.

"The factory received 45,000 tons of beets from the Chino farmers and nearly 7,000 tons from Anaheim, making a total of nearly 52,000 tons of beets, from which was produced 15,100,000 lbs. of sugar. The season was a most profitable one to the factory also. The Chino factory will be increased to 1,000 tons capacity for 1894, to be able to take the product of over 6,000 acres in Chino and 3,000 acres from Anaheim. We expect a total production of 60,000 tons at least from Chino and about 35,000 tons from Anaheim.

"There is no doubt but that Southern California has the climate and soil par excellence for the sugar beet; we can raise beets cheaper here than they can in France and Germany, with their low priced labour, because of our favourable summers and autumns for harvesting, our more fertile soil, and our much higher percentage of sugar."

Public Works.

In my last report I stated that the Pasadena and Mount Wilson Railway was constructing a cable-electric railway to a peak of the Sierra Madra mountains overlooking Los Angeles. This railway is now completed to Echo Mountain 3,500 feet above the sea. The second section, which is a cable road worked by electricity, is 3,000 feet long, and makes a direct ascent of 1,300 feet. The president of the company writes me that the undertaking has been a financial success, and that the third section extending the road to a peak 6,700 feet above the sea will now be constructed, and that another large hotel will be built by the company at this higher elevation. He adds that first mortgage bonds to the amount of 100,000*l.* payable in gold with interest at 7 per cent. were authorised by the company; that 40,000*l.* worth have been sold, and that a portion of the remaining 60,000*l.* will shortly be offered for sale. Mountain railway.

In 1873 the Los Angeles and Independence Railway was constructed from Santa Monica to Los Angeles, and was to have continued to Independence in Inyo county. The financial panic of that year, however, arrested further construction; subsequently the Carson and Colorado Railway was constructed to Independence from the north, and the project to construct from Los Angeles was temporarily abandoned. Railway to Owens Valley.

The matter is now again under discussion, a company has been organised, and it seems probable that a railway will be built from Los Angeles to the Owens Valley, Inyo county, if bonds to cover the cost of construction can be sold in England. I do not know enough about the country through which this line will pass to express an opinion on the merits of the enterprise. I do know, however, that it is a mistake for the British public to subscribe for American railway bonds when the whole cost of the enterprise is to be paid out of the money realised on the sale of such bonds.

For several years past I have commented at some length on a proposed new railway from Los Angeles to Salt Lake City, pointing out that it would pass through a very rich mineral country; that it would give Los Angeles cheap fuel and direct connection with the North-Western States, and that it would materially affect present and prospective British interests in this district, and the demand for Australian coal. The Nevada Southern Railway has been incorporated to construct this road, and commenced the work of construction last year at this end of the line. The line has been completed to Vanderbilt, an important mining camp about 30 miles north of the point of commencement, and the work of construction has now ceased for the present owing to financial troubles. Railway to Salt Lake City.

The Chamber of Commerce of Salt Lake City writes me as follows:—

"We have attempted on several occasions to promote local interest in the proposed road connecting this city with Los Angeles,

but have made no satisfactory progress. The depressed financial condition makes it difficult for us to accomplish much although we recognise the vast effect upon this country the construction of the proposed line will have."

A railway manager wrote me last year that this line will never be built until the Union Pacific decides to undertake the work.

Another correspondent, also a railway man, now confirms this opinion as follows:—

"The Union Pacific is the only line at all likely to build from Los Angeles to Salt Lake, and, owing to the financial troubles of many of the overland railways further construction by that Company at present is out of the question. I know nothing of the Nevada Southern, but see from the newspapers that it is in trouble financially, hence am led to believe that its bonds have not been placed in England, and from my knowledge of that market I doubt if they ever can be. It is quite evident that another independent transcontinental road cannot be made to pay, and they understand that proposition in London just as well as we do."

Notwithstanding the opinion of this correspondent, in whose judgment I have confidence, I have reason to think that the road will be built and that it will pay. Persons in England who contemplate investing in the bonds should see that the promoters on this side put something in besides "experience." As stated elsewhere in this report it is quite time that English investors ceased building American railways by purchasing bonds of companies whose share capital consists wholly of heavily watered stock.

Agriculture.

Over-production of oranges.

In regard to the alleged over-production of oranges, the following facts speak for themselves:—The export of oranges in this district in 1890 was 26,000 tons; in 1893 it was 67,910 tons; and 1897, when the orange groves now planted will be in bearing, it will be not less than 200,000 tons unless the trees be injured in some way. There are 300 boxes to the ton, and the cost per box for the boxes, and picking, packing, papering, and hauling to point of shipment averages 1*s.* 6*d.* per box. The railway freight to New York and other cities in the Eastern States in car-load lots (10 tons) is 3*s.* 6*d.* per box, making the total disbursements (exclusive of middlemen's charges) 5*s.* per box. The grower, who 3 years ago received 10*s.* to 16*s.* per box net, must net 4*s.* per box on oranges grown on land of average value (say land worth 40*l.* per acre), and the commission merchant charges 10 per cent. on price realised, California oranges, therefore, must sell for 10*s.* per box in the Eastern States to make the industry profitable to the grower. The Florida orange growers recently presented a petition to Congress asking that the duty on oranges be increased from 1*s.* to 4*s.* per box, and recited the following facts: that Florida produces from 300,000 tons to 500,000 tons of oranges

annually; that it costs 6*s.* per box to produce oranges in that State and ship them to New York; and that the Mediterranean competitors pay so little for labour that they can pay the present duty, and lay down oranges in New York at 5*s.* per box. It would appear from the foregoing that the outlook for the California orange grower was not very bright. The following facts, however, put a somewhat better aspect on the matter. The best California oranges ripen late in the season and do not reach the consumer until the Florida and Mediterranean crops are pretty nearly exhausted. They have a better flavour too, and for that reason command better prices. It is alleged, and I think with reason, that they bear transportation and changes of climate better than other oranges, and on that account they have the monopoly of all the North-Western States. If this be true there is little danger of over-production, as the markets in the North-Western States have been but little developed, and will expand almost indefinitely as the population increases. The low prices realised for California oranges in the last 2 years is ascribed to want of proper organisation on the part of the growers, the result being that too many oranges are shipped to some cities and few or none to others on this point, and as to freight rates, the President of the Chamber of Commerce of this city in an address recently delivered before that body is reported to have spoken as follow:—

"The indiscriminate shipping of fruit on commission, which has prevailed during the past 2 years, has resulted in demoralising the Eastern market, and our people ought not to need further lessons on this point. As to the matter of freight charges a general appeal should go up from every section of Southern California for their reduction at least during the remainder of the present season. The present rate is 50*l.* per car-load. This is too much, and is certainly more than the traffic can bear. Under the most favourable circumstances the railroad gets more than the grower out of the crop, and frequently, as the case stands, it gets two or three times as much. From present appearances, unless some action is taken by the roads very soon, a good part of the present crop will not be carried at all. With so large a part of the eastern population denied the small luxury of two or three oranges in a whole year I decline to believe the orange business is overdone. I believe that within a year or two it will re-establish itself under new conditions, and will be as prosperous as any reasonable man could ask."

When the President of the Chamber of Commerce admits that the railways get "more than the grower of the crop" (the amount paid the railway as stated above being 3*s.* 6*d.* per box) "and frequently two or three times as much," I hazard nothing in advising Englishmen not to invest in orange groves until it has been proved that a market can be found for the 200,000 tons of oranges this district will produce in 1897.

Loss by frost.

The crop this year will be about one-third of last year's crop, owing to very heavy losses by frost and wind storms. In Riverside

and other orange-growing districts in San Bernardino county, I am advised that the loss from frost will reach 60 per cent. of the crop, in Los Angeles county from 5 per cent. to 20 per cent. Duarte, in the eastern portion of Los Angeles county, is almost the only important orange-growing district which has entirely escaped loss by frost. Since writing the foregoing I see in the Press that the duty on oranges is likely to be reduced from 1*s.* to 8*d.* per box. The following is taken from an article in a local paper on "Fruit growing and Immigration":—

"A controversy has arisen in the horticultural Press upon the question whether it is better to proclaim boldly the deplorably overdone condition of the fruit growing industry and to publicly discuss the best means of remedying it, or to continue on the track hitherto followed of protesting that everything is extremely prosperous, and that over-production is an impossibility—with the view of unloading upon the tender foot. Altogether apart from the moral aspect of this question, we should think that its solution on the ground of policy could not present any very serious difficulty. Selling out can only suit the speculative, movable element, a fraction of the whole, and that the least desirable. The great majority, for one reason or other, must stay where they are, and devote themselves to the improvement of their conditions, or to making the best of them."

In the course of this controversy, it has been urged that the present protective duties on raisins, oranges, and prunes are essential to the continuance of those industries and that over-production will be overcome by marketing the surplus in Europe. It is not explained, however, how growers here can compete with those in Europe without reducing prices in the home market to the figure they would stand at if there was no protective duty. The true solution appears to be that the home market should be thoroughly worked up by small shipments to all the towns and villages of the Eastern States, and the cost of production and marketing be cheapened as much as possible by improved appliances. When the Nicaragua Canal is completed, it is not improbable that fruit growers here will be able to compete with those of Europe, at present, however, the cost of production and transportation appears to preclude this solution of the difficulty. It is stated above by the President of the Chamber of Commerce, that freight rates should be reduced. I wrote Mr. Crawley, of the Southern Pacific Company, on the subject, and in his reply he makes the following remarks:—

"Cars containing citrous fruit are given special service in the matter of time and personal attention on the part of train men, who are expected to open and close ventilators according to temperature, which varies considerably in a run of from 2,500 miles to 3,000 miles from sea-level to sea-level over ranges of mountains 7,000 feet to 9,000 feet elevation. Citrous fruit is generally loaded in refrigerator cars that weigh 12,000 lbs. to 14,000 lbs. more than the ordinary cars. Hence, these facts taken into consideration, show that the rate of 5*s.* per 100 lbs. is a very low one."

The Horticultural Commissioners for the county of San Bernardino report as follow:—That the orchards in that county are comparatively free from insect pests and diseases of a dangerous character; that 5,867 acres have been planted in fruit trees during the year 1893; that, taking into consideration the reduction in territory in that county owing to the formation of Riverside county, this is a large increase on the acreage planted in fruit trees in 1892; and that the total acreage in fruit trees in that county on November 1, 1893, was 32,164. The Horticultural Commissioner for this (Los Angeles) county writes me that the total acreage in fruit trees in the county is 60,050 acres. With reference to scale bugs he says:—"The white and yellow scale have practically disappeared. The red and black are still giving trouble in the citrous orchards. In the deciduous orchards we still have 'pernicious,' 'black,' and 'frosted' scale, and in the apple and pear orchards, 'woolly aphis' and 'codlin moth.' In some districts the frost did considerable damage to the orange and lemon crop, not to exceed 20 per cent. in the worst, in many districts no damage at all was done."

Scale bugs.

I pointed out some years ago that the "white scale" had almost destroyed the orange trees in this district, and that this scale was entirely exterminated by the Vedalia Cardinalis, an insect imported from Australia. It is recognised that the marvellous success of this experiment was due to the fact that the natural enemies of the Vedalia Cardinalis were not brought with it, and it therefore had an advantage which it did not possess in its native land. Other similar experiments are constantly being tried to destroy the "red scale" and other injurious pests, as yet, however, without any marked success. Extermination of any species by parasites is the exception, as their mission in nature is not to exterminate, but to impose a check on too great increase.

In my report for 1891 I stated, on the authority of the Secretary of the State Board of Viticulture, that a new disease known here as the "California vine disease" had destroyed 20,000 acres of vines in this district. Professor Newton B. Pierce, an agent of the Department of Agriculture, who is now stationed in Southern California conducting experiments on plant diseases, writes me as to this disease and as to the phylloxera as follows:—

"The 'California vine disease' remains about as last year. It developed during the heat of the summer of 1893 in a considerable number of the remaining old vineyards and a few of the new. While decreasing as a whole there are still a few new cases, and the old are still present, a few old vineyards becoming virtually worthless in 1893. Small vineyards kept well supplied with moisture show greater powers of resisting the trouble than formerly.

"With respect to phylloxera, I have to say that I discovered the insect in a small vineyard of V. Vinafera vines about 18 months since. Its presence there (on that ranch) was apparently of some 8 years to 10 years standing, but owing to the fact that

the old vineyard on this place died suddenly through the action of the 'California vine disease,' and shortly after the probable time of introduction of phylloxera, that insect is supposed to have only retained life in a few remaining roots of the old vines. A later vineyard of muscats was set upon this ground, and I discovered the presence of the pest some 2 years after it had begun its work in this second vineyard. As there are almost no adjoining vineyards, owing to their destruction by the California disease, it is believed by most residents that the insect is confined to this muscat vineyard of some 4 acres. This vineyard has been removed, and is being watched with care and the ground treated according to the views of the Horticultural Commissioners. It is hoped by the growers that the insect is now effectually limited to the one spot and that no general harm will result from its presence. The radical and thorough measures, which, as an agent of the Department of Agriculture, I have recommended and worked for have not been carried out. Time will only tell the wisdom or short-sightedness of this matter. We hope for the best.

"I can say, at least, that there is no immediate danger of a general nature pending, and, even if the insect is not wholly destroyed, any general danger may be prevented for a quarter of a century, or even longer, if proper steps are followed from now on. The immediate danger is so small that publicity will assuredly do far more harm than the pest itself is capable of doing as now conditioned. Orange county is the only seat of the pest at present in Southern California, so far as known, at least in a 'Vitis vinifera' vineyard."

Olive oil.

I stated in my last report that it was reported that Mr. Elwood Cooper, of Santa Barbara, had sold his olive groves to an English Company for 40,000*l.* Mr. Cooper, who is the founder of the olive oil industry in this State, informs me that the sale was not completed, and he has kindly given me the following interesting particulars about the industry.

"Last year was 'an off year' for olives. We never count on getting more than one fair crop in 2 years. The best return I have had is 1,500 bottles to the acre, but this is not to be expected often. 500 bottles to the acre is a good crop, selling retail at 4*s.* per bottle. The commissions, insurance, advertising, &c., amount to fully 25 per cent., and picking, packing, bottling, &c., 25 per cent. more, leaving 250 bottles per acre, and from this again must be deducted the cost of pruning, washing the trees, cultivating, and other expenses. It is a good business if you can sell the oil for 4*s.* per bottle. I can sell all I have for the present, but when the large orchards now being planted come into bearing it is a question. Unless consumers who use the imported abominations sold under false labels can be instructed as to the danger of using cotton-seed oil in any form." The olive tree grows well here, and the business has been so profitable that a large number of persons have engaged in it the last 3 or 4 years. It is estimated that there are about 6,000 acres in olive trees in this district, and the acreage is largely increasing every year.

In October last, an International Irrigation Congress was held in this city, and was attended by duly accredited delegates from New South Wales, South Africa, British India, France, Russia, Mexico, Ecuador, Peru, and 16 States and territories of the United States. The Congress sat 5 days, and before adjourning adopted an address "To the people of the United States," from which I make the following extracts:—Macauley's prophecy, that when the New World is as thickly populated as the Old, wages will be as low, and as many people will be out of employment as in the Old World, and "then the institutions of the United States will be fairly brought to the test," is first recited, and the address continues as follows:— Irrigation.

"The public lands which still belong to the people of the United States are for the most part arid or semi-arid, requiring the artificial application of water to render them productive. They lie between the 97th meridian and the Pacific Ocean and are divided between 17 States and territories. This domain is estimated by the General Land Office to contain 542,000,000 acres. Enough of this land is arable to provide homes and farms for millions of people. The portion which can never be cultivated is valuable for range purposes or for forest reservations. Notwithstanding the present condition of these arid lands, we confidently predict that they will become the seat of the highest civilisation and the greatest average prosperity yet developed on this continent. The intensive scientific cultivation rendered possible by irrigation results in the largest conceivable development of independence and prosperity on the fewest possible number of acres. The conditions of social life which naturally grow up in a region of small farms are among the strongest attractions of the irrigated districts of the west."

The address then recites the existing conditions, and the national legislation required, and outlines a policy calculated to result in a uniform system of irrigation works. Reference was made to the fact that the irrigation of the rice fields of India has proved profitable financially. As, however, both money and labour are cheap in India, the inference that extensive irrigation works will prove correspondingly profitable here is hardly a fair one. An official report of the proceedings of the Congress has been issued, and is for sale here, price 1*s*.

In my report for 1891 I commented at some length on an irrigation law of this State, known as the "Wright Act," under which two-thirds of the freeholders in any district capable of irrigation from a common source, may form an irrigation district, vote bonds, and use the money in supplying their lands with water. Bonds have been issued in this and adjoining counties to the amount of several millions, and a very large increase has been made in the acreage of land suitable for fruit culture. The principal objection to the Act is that the land is made too valuable for general farming, and it is uncertain whether it will pay to plant more fruit trees. As a rule, persons lending money on mortgage refuse to lend on land included in an irrigation district, Irrigation Act.

as the bonds are a first lien, and cases have come within my knowledge of grain farmers losing their property owing to inability to pay the annual assessment to cover the interest on the bonds. The bonds negotiated have been taken almost wholly by contractors for work done in supplying water.

Kern county.

The system of irrigation in Kern county, which is the most extensive and complete of any county in the State, was not the result of legislation enactments, but was wholly the result of private enterprise. The main canal and branches aggregate nearly 700 miles, and at the point of diversion the canal is 120 feet wide. Apart from the raisins, peaches, and other fruits raised on the irrigated land in this county, the introduction of water on the arid plains of the county has produced the largest fields of alfalfa in the State, supporting large bands of sheep and cattle. In my last report I pointed out that the census of 1890 placed the average value of arable land in Kern county at 2*l.* per acre, and in Los Angeles county at 19*l.* per acre, and I hazarded the opinion that the difference is due to the fact that the heat in Kern county is almost unbearable in summer. This remark brought forth a protest from the Kern County Land Company, a corporation which has a capital of 2,000,000*l.* and has for sale 325,000 acres of land. I am assured by the manager of this company that the heat is not unbearable, and that it is always cool at night. He adds, "The community includes some 150 to 200 English, settled here during the last 4 years. We are making special efforts to increase and strengthen the English colonies established here, and depend largely on Great Britain for future settlers. With such extensive properties to dispose of, our policy must be a permanent one, and we make it our strict duty to prevent investment by those who appear unfitted for the country, or who have insufficient money to successfully bring their orchards into profitable bearing. Prices of land vary from 15*l.* per acre to 20*l.* per acre according to location, and include a perpetual water right. A charge of 6*s.* per acre per annum is made for the use of a stipulated amount of water, such as is deemed sufficient to properly irrigate the crops planted." At the request of the company, Mr. W. Herbert Farquharson, an English settler, has written me about Kern county, and I make the following extract from his letter: "The only discomfort is the heat in the summer. It is, however, perfectly healthy, and I have worked all the hay season from 6 A.M. to 6 P.M., pitching alfalfa hay without feeling any ill effects. If a man is steady, industrious, and free from extravagant and self-indulgent habits, let him come to this country; without these characteristics he had better stay away, as it will only end in his failure, and in his giving the country an undeservedly bad name." Exactly so; with these characteristics, however, a man can succeed in England, and need not expatriate himself to make a living.

Captain Almeric E. F. Rich, who is now an agent at Bakersfield, of the Kern County Land Company, has also written me, at

the request of that company, stating that I may embody the whole or a portion of his letter in this report, and I make the following extracts from it: "I am not a practical farmer. From May, 1878, till March, 1892, I was in the English army, from which I retired as Captain at the last date named—my regiment was known in the old days as the 10th Foot." Captain Rich states that he purchased 40 acres of land, of which 10 acres was planted in prune trees, and the remainder in barley and corn, and proceeds as follows:—"Prices for produce of all kinds have been unusually low this winter, yet my returns off the land in 19 months represent 30 per cent. on my outlay, no return of course coming from the 10 acres planted in prune trees, but, on the contrary, some expense being caused by the necessary care and cultivation of those trees." This is the most successful farming that has come to my notice in the 12 years I have been in California. The letter proceeds as follows: "Hens lay nearly all the year round here, and the market for eggs is good, while the price for good chickens for the table is high. Milk and butter sell readily at good prices. Hogs at the present time one can hardly buy, those who have them being anxious to have more; now I wish to point out that I have paid for all labour and work done on the place, not putting in a day's labour myself, and labour, as you know, is dear here."

I have stated elsewhere in this report, and again earnestly reiterate my advice that Englishmen coming to California to farm should not purchase land until they have spent at least 1 or 2 years here. Land can be rented in all parts of the State, and if general farming is as profitable as from Captain Rich's letter it would appear to be, an industrious tenant farmer can no doubt make enough money in a few years to buy a farm.

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VENEZUELA.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF THE CONSULAR DISTRICT OF CARACAS.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1207.

Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.

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Reference to previous Report, Annual Series No. 1207.

VENEZUELA.

CARACAS.

Mr. Boulton to the Earl of Kimberley.

My Lord, *Caracas, April* 26, 1894.

I HAVE the honour to enclose this Consulate's yearly returns, as also Reports from the La Guaira, Puerto Cabello, Ciudad Bolivar, and Barcelona Vice-Consulates; but those from Maracaibo have not been received.

I have, &c.

(Signed) H. L. BOULTON.

Report on the Trade and Commerce of the Consular District of Caracas for the Year 1893.

ABSTRACT of Contents.

	PAGE
Caracas—	
Revenue; exports	2
Floods; census; public works; waste lands; Chamber of Commerce; canalisation; tram and railways	3
Coffee; post and telegraphs; banks	4
Immigration; exchange	5
La Guaira—	
Coffee; cocoa	6
Various articles; imports	7
Labour; telegraphs; telephones; lighting; carriage	8
Railways; harbour	9
Ciudad Bolivar	15
Barcelona	18

Introduction.

It would be a hopeless task to attempt the compilation of reliable statistics in this inland city, and only from the reports of the Finance Department to Congress can the revenue and exports of the Republic be ascertained.

The accompanying tables, Nos. 1 and 2, show the revenue and exports from July, 1892, to July, 1893.

Table 1.—REVENUE for Fiscal Year 1892–93, compared with 1889–90.

Description.	1889–90.	1892–93.	Compared Result.	
			Increase.	Decrease.
	Bolivares c.	Bolivares c.	Bolivares c.	Bolivares c.
Imports	33,457,477 06	28,358,210 68	...	5,099,266 40
Storage	61,778 82	57,447 29	...	4,331 53
Interest	58,081 06	68,389 01	10,307 96	...
Fines	49,026 62	46,611 78	...	2,414 84
Transit dues	7,382,737 60	6,652,784 61	...	729,952 99
Duty on tobacco	...	712,209 38	712,209 38	...
Stamped paper	168,413 28	126,424 78	...	41,988 50
Telegraphs	334,244 90	96,022 05	...	238,222 85
Telephones	1,317 38	...	...	1,317 38
Waste lands	139,705 39	...	...	139,705 39
School fines	1,517 00	6,137 21	4,620 21	...
Recurso de casacion	970 00	...	...	970 00
Consular fees	40,127 38	111,761 93	71,634 55	...
Registry	111,607 27	68,067 78	...	43,539 49
Salt dues	1,075,501 35	259,648 61	...	815,852 74
Income of public institutions	540,551 63	...	...	540,551 63
Contract fees	...	1,474 57	1,474 57	...
Maracaibo wharf	11,848 67	...	...	11,848 67
Total	45,031,224 86	36,724,973 09	800,246 66	9,106,498 43
Comparison	36,724,973 09*	...	...	800,246 66
Decrease	8,306,251 77†	...	...	8,306,251 77

* At 25 bolivares 25 c. to the *l.*, equals 1,454,454*l.*
† At 25 bolivares 25 c. to the *l.*, equals 328,960*l.*

Table 2.—EXPORTS from Venezuela during the Fiscal Year 1892–93.

Articles.		Quantity.	Value.
			Bolivares.
Coffee	Kilos.	40,727,203	67,296,350
Cocoa	„	5,916,513	8,584,176
Hides	„	1,632,937	1,343,090
Deer and goat skins	„	806,201	2,388,778
Timber	„	3,326,512	176,231
Cocoanuts	„	508,512	46,566
Cattle	Number	9,955	969,646
Goats	„	94	810
Horses and mules	„	86	23,320
Donkeys	„	282	12,284
Gold and silver coin	Kilos.	386·570	1,009,723
Virgin and placer gold and residuum	„	1,653·296	4,168,861
Copper ore and old copper	„	7,265	4,243
Caoutchouc	„	60,073	364,193
Copaiba	„	11,666	32,344
Sundries	„	6,599,617	2,371,491
Total			86,420,615*

* At 25 bolivares 25 c. to the *l.* equals 3,516,519*l.*

Year.	Value.
	£
In 1889-90 the exports were	3,999,726
1892-93 „ „	3,516,519
Decrease	480,207

Inundation. The excessive rainfall during the greater part of last year caused the inundation of the towns of Carora, State of Falcon, and Rio Chico, State of Miranda, detrimental in no small degree to property in general; but fortunately no lives were lost.

Census. According to last census of 1891, the population of Venezuela is of 2,323,527 inhabitants, 1,137,139 males, and 1,186,388 females, showing an increase of 201,539 on last census of 1881.

Public works. These have been at a standstill for some time past, therefore numerous hands are unemployed. It is, however, expected that the Government will shortly be in a position to resume them.

Library. The National Library, consisting of 50,000 volumes and manuscripts, has been removed to a splendid central locality, and is daily visited by numerous persons of both sexes.

Acclimatation. A central board established in Caracas is lending its serious attention thereto, and promising results are anticipated. Contributions of valuable works on this subject have been received from France, Spain, and the United States, through the instrumentality of their representatives here.

On a portion of land ceded by Government a model farm is contemplated, the building thereon to be of sufficient capacity to contain the necessary implements for lecturing on agriculture, rural economy, mechanics, geology, &c.

Waste lands. There are 200,000 square kiloms. suitable for agricultural purposes. 100,000 square kiloms. pasture lands, and some 600,000 square kiloms. of forests, &c.

Chamber of Commerce. Installed on January 10 last by the principal merchants of Caracas, this institution promises to be of great utility to the country.

The first number of a monthly publication on statistics, &c., was issued in March last, and it is therein mentioned that circulars have been forwarded to foreign chambers of commerce, and that a vote of thanks was conveyed to Sir V. K. Barrington as one of the promoters of this institute.

Canalisation. The canalisation of the River Yaracuy, in the State of Lara, if sanctioned by Congress, as expected, would tend to greatly increase trade by reducing the freights on merchandise and produce to and from Puerto Cabello.

Tramways. During 1893 some 722,007 persons availed themselves of this means of locomotion as supplied by the two existing companies.

Railways. Those between La Guaira and Caracas, and Puerto Cabello and Valencia, in the hands of British companies are in full activity; but the works on the Central Railway have been discontinued

since the failure of Messrs. J. E. and M. Clark and Co. Costly bridges have been unfortunately carried away by the flooding of the rivers over which they were constructed, and the enterprise is reduced to the plying between this city and Petare, a town some 12 miles distant. I learn that an agent has arrived here in view of coming to an arrangement with the Government for the continuation of the work.

The German or Great Railway of Venezuela line was inaugurated on February 1 last, and His Excellency Count von Kleist, as also the Commander and Staff of the German war ship "Stein," that purposely called at La Guaira that they might attend the ceremony, were present.

The speeches and toasts to Germany, its representative, and continuance of the friendly relations between the two countries, were enthusiastically received.

There can be little doubt that this line will prove a great boon to Caracas, Valencia and intermediate towns of El Consejo, La Victoria, Turmero, and Maracay, as well as to at least half-a-dozen more of less importance.

Coffee. Prices decreased in the early part of the year and transactions were heavy.

The agriculturist, due to bad weather and scarcity of hands, was precluded from sending his produce to market, and a decline on previous prices taking place, brought on serious loss; for unwashed coffee declined from 21 pesos to 19½ pesos, and washed coffee from 23 pesos to 21 pesos.

At first complaints were received from Europe as to quality, the which are plausible taking into account the continuous rains that did not permit the usual care in its drying, &c.; but this has been remedied since the return of fine weather.

Postal system. Under the present administrator some improvement in the conveyance of mails has been realized by its division into 91 lines, say 11 by sea and river, 5 by rail, 17 on horseback, and 58 by couriers.

Telegraphs. Seven lines connect this capital with other cities; total mileage 6,172.

These lines unite 114 stations, but only 87 are in working condition. During the year 206,921 messages were transmitted, yielding 1,054,143·15 bolivares or at exchange of 25·25 bolivares to the 1*l.* equal 41,748*l.* Of these messages 70,299 were official.

Telephone. The use of the telephone is increasing; total of subscribers to the "Venezuela Telephone and Electric Appliances Company" 2,097, an increase of 167 since 1892.

The "American Electric and Manufacturing Co." is not so well patronised, but manages to pay its way. Two lines to connect Villa de Cura, La Victoria, and other towns of the Aragua Valley, near Valencia, and in the State of Los Andes, are being constructed.

Banks. Both the Bank of Venezuela and Bank of Caracas are progressing satisfactorily.

Agricultural bank. The contract for the establishment of this institution is before

Congress. The press as well as the mercantile community, including the Chamber of Commerce, are greatly opposed to the clause empowering the issue of mortgage bonds and other paper, and the latter body has petitioned both Houses to take into their serious consideration the evils that might ensue if the contract were sanctioned.

Specie. On April 4, 1893, a decree, empowering the coinage of 6,000,000 bolivares in silver, was issued; but has been reduced by decree of November 25 of that year to 2,000,000 bolivares; and this latter amount has been introduced into the country from France.

Immigration. Several contracts have been entered into to introduce some 300,000 immigrants, but these have not been carried out, and 1,000 only have thus far arrived from the Canary Islands.

Exchanges. Exchanges during the year ended December 31, 1893, have been :—

	From—	To—	
	Bolivares.	Bolivares.	
On England	25·25	26·60	Per 1*l.* sterling
France	3·95	3·97½ and par	Per 4 bolivares
Germany	1·24	1·24½ and 1·25	Per mark
United States	528	533·32	Per 100 dol.

MARKET Price of Public Debt.

Description.	Amount.	At—
	Bolivares.	Per cent.
Consolidated 5 per cent. ..	38,632,930	40
Titles of 1 per cent.	3,792,281	87
Floating Debt	10,000,000	36
Debt of the Revolution ..	99,850,000	6½
Spanish Debt	..	40
French Debt	..	51

LA GUAIRA.

Mr. Vice-Consul Anderson reports as follows :—

The following has been collected by me during the year from information obtained at the custom-house of this port, from the several steamship agencies, and the railway and breakwater companies.

Table A annexed shows the different articles which are imported from foreign ports.

Table B.—A list of the principal articles received from other parts of the country for the consumption of the district of La Guaira, and value of same in £ sterling.

Table C.—The amount of duties paid to the custom-house of La Guaira during the year 1893.

Table D.—The shipping calling at the port of La Guaira, 1893.

Table E.—Return of the principal articles and specie exported from La Guaira during the year ended 1893.

Coffee.

Coffee in this market is classed as follows :—

Descerezado. This is the clean bright green coffee of commerce, and is highly esteemed in Europe and America. When the berries are gathered from the trees they are carried directly to the hulling machine, and the grain separated from the pulp, after which process it is immersed in a tank of water to be washed, where it is allowed to remain for 10 hours, and afterwards dried. The price of this is about 3*l.* 15*s.* per 100 lbs.

Trillado. This coffee, after being gathered, is exposed to the sun, and, when thoroughly dry, is thrashed and cleaned. It is asserted that coffee loses something of its essential oil when washed, and, consequently, this class of the article is preferred by many persons. Price, more or less 3*l.* 5*s.* per 100 lbs.

Caracolito. This is selected from other coffee, the grains being small and round. Price : always some shillings more per 100 lbs. than the descerezado.

Pasilla. This comprises the black, broken, and defective grains, and such as have suffered from exposure or improper preparation. The price is about 2*l.* per 100 lbs.

The major part of the coffee shipped here comes from the coast near La Guaira and from interior towns or Caracas.

In consequence of the duties imposed in the United States of America on Venezuela produce, very little has been sent there, a great difference, therefore, exists between this year's shipments and those of 1892.

Cocoa.

Cocoa. The preparation of cocoa is quite different.

The cocoa pods are carried to out-houses and spread in the shade, where they should be left for 8 days in order that they may become mellow, they are then opened with a knife, the beans taken out and placed upon tables exposed to the sun until they become red.

To ferment or sweat the beans they should be placed in a cellar

or in boxes and barrels in a cool place for 4 or 5 days, covering them with banana leaves with weights above, but must be stirred and aired every morning and evening, after which they are spread out in the sun and dried until they sound hollow on being stirred, when they are ready to be sacked for the market.

These beans, roasted or boiled for some time, will make an inferior kind of chocolate destitute of any fatty principle, but very agreeable to the taste, this process is resorted to amongst the poorer classes.

The ordinary class of cocoa comes from Rio Chico and Higuerote (Port Carenero), and the better class from Ocumare and Caracas. Prices range from 3*l.* to 3*l.* 5*s.*, and from 5*l.* to 6*l.* per 100 lbs. Much cocoa has been lost owing to the prevailing heavy rains.

Hides, deer, and goats' skins and horns.

These articles come from Barcelona and Rio Chico, but mostly from Caracas and the interior towns, and is preferably exported to the United States of America.

Articles.		Prices.	
		£	*s.*
Hides	Per 100 lbs. ..	1	0
Goat skins	„ ..	2	0
Deer skins	„ ..	3	12
Horns	Per 100 ..	0	16

Indian caustic barley.

The Indian caustic barley, or "cebadilla," grows on the hilly parts and neighbourhood of Caracas, and is on more demand than formerly. Price for 100 lbs., 20*s.*

Sundries.

"Living plants," chocolate prepared in Caracas, caoutchouc, and other articles of little value not mentioned are seldom exported.

Specie.

Gold shipped from here is principally United States American gold coin for purchase of merchandise in Europe and United States of America. All foreign gold has its full value in Venezuela; 1*l.* equal to 6·31¼ pesos macuquinos, but the circulation of foreign silver coin is prohibited.

Coffee and cocoa planters always keep their money in gold coin, and often refuse payment of their produce if tendered in bank notes.

Mines.

A copper, argentiferous, and lead mine has been discovered about a mile west of this city, but is still unexplored.

Coal.

Some years ago extensive beds were found on the banks of the River Unare, 40 miles east of La Guaira, the only deposit of bituminous coal known, and reported to be of superior quality to that of Barcelona. All coal imported is free of duty.

Imports.

Merchants here complain of the carelessness of European exporters in packing goods of one class in the same box or bale with goods of another class, this giving rise to the duties on the whole package being calculated on the article therein contained paying the highest duty. Exporters should bear in mind that duties are charged on the gross weight of every package, and

these, therefore, should be of the lightest material consistent with strength. Machinery for mining and for coffee estates, sugar mills, and all kind of machinery should be shipped in pieces as small as possible, and a crate should be used to protect the more delicate parts.

Carriage. Cargo en route to the interior is conveyed to most parts on donkeys, each donkey carrying about 200 lbs. weight. Goods are transhipped by coastwise steamers and sailing vessels to small towns on the coast, and by railroad to Caracas, where they are forwarded for points within 30 miles south from Caracas, and by the German railway 30 miles west.

La Guaira. La Guaira is situated in latitude 10° 37′ north, and longitude 66° 56′ west of Greenwich, a city of 10,000 inhabitants, lying on the shore of the Carribean Sea, and is the emporium of Caracas, the capital of Venezuela, from which it is distant 10 miles. The warm season continues from March until November, and observations during the year shows from 77° to 94° by Fahrenheit's thermometer. It may be said that there is no healthier place in Venezuela, and many people from Caracas and the interior regularly visit La Guaira to enjoy its mild climate and fine sea bathing.

The approaches from La Guaira to Caracas are four in number: one coach road of about 20 miles; two mountain roads built long ago by the Spaniards, one of which was paved throughout, but is now in a sad condition; and the railway, 23 miles in extent.

Factories. There are a few establishments on a small scale, manufacturing soap, candles, chocolate, starch, macaroni, shoes, and hats, besides one or two tanneries, saw-mills, and blacksmith's shops.

The number of workmen employed in these is inconsiderable, the larger proportion of the work being done outdoors.

Employment of labourers: skilled and unskilled. Employment has decreased for some months past. The latter class earn from 3*s.* to 5*s.* per day, wages paid weekly. The customary hours of labour are from 6 A.M. to 11 A.M., and from 12½ P.M. to 6 P.M.

Telegraphs. The telegraph lines are owned by the Government. Telegrams are wired to all parts where there are branches, at the rate of 10*d.* for 10 words.

Telephones. There are two companies, one English and the other American, both being in communication with Caracas.

Cable. French cable company, connected with the Dutch Island of Curaçao, the only one in Venezuela. Despatches are at the following rates:—From here to England and Europe, 11*s.* 1*d.* a word; Canada and United States of America, 10*s.* 4*d.*; the British Islands, 9*s.* 3*d.*

Electric light. A contract has been signed with an American company to furnish electric lights for public and private use.

Cable road. A contract has been entered into with an American company to perforate the mountain or mountains between Caracas and this port, but the Press appeals to Congress not to sanction it.

Printing offices. Two in number, property of the merchants of this city.

Churches. Three. The Roman Catholic is the religion of the country.

Hospitals. Three. Several foreign lines of steamships pay a voluntary

monthly contribution to the hospitals, and sailing vessels each time they clear from this port pay about 2*s.* each.

Cemeteries. Three. One for Protestants, or foreigners, and two for Catholics.

Physicians and surgeons. There are 10 physicians and surgeons.

Drug stores. The drug stores are five in number.

Railway from La Guaira to Caracas. This belongs to an English company, and is controlled by English people. It is one of the best managed railways in Venezuela. They have about 18 engines, 10 first and 20 second passenger cars, and 120 freight wagons. Two passenger trains leave this and Caracas twice a day, at 8.30 A.M. and 3.30 P.M., and as many freight trains as the amount of cargo requires. Freight from here to Caracas, 3*s.* per 100 kilos. First-class passage 10*s.*, and second-class 6*s.* 4*d.*

Macuto, La Guaira, and Maiquetia Railroad. This road, built with Venezuelan capital, is about 5 miles long, and connects La Guaira with Macuto and Maiquetia, two goodly-sized villages, where many La Guaira merchants have their residences.

Shipping and navigation. Harbour Corporation. Since the conclusion of the La Guaira breakwater by an English company vessels are enabled to discharge and load their cargoes alongside of wharves, instead of in lighters as formerly. These wharves have iron sheds, under which the cars are loaded, proper warehouses are provided, and goods are not exposed to the elements. Passengers land alongside the wharf, and are taken by train to the custom-house to have their luggage despatched. There is further a passenger agency which attends at a small cost to the whole despatch of luggage, &c., until placing passengers at the Caracas railway station, or at the hotels in town or in Caracas.

The principal charges on vessels arriving here are as follows :—

Description.	Amount.		
	£	*s.*	*d.*
Captain of the port's fees	0	10	0
Doctor's visit	0	10	0
Interpreter's visit	0	10	0
Translation of store list, manifest, and other papers for a page of 20 lines ..	0	8	0
Stamps on each bill of lading	0	0	9½
Water dues—			
Sailing vessels for each register ton ..	0	0	9½
Steamships pay only the amount of ..	9	10	2
Wharf dues and lighthouse for each register ton, steamships and sailing vessels	0	0	1
For every 100 kilos., export and import cargo	0	0	1
Clearance, stamps and stamp paper ..	0	5	0
Sand ballast, ordinary charge, loaded in lighters, per ton	0	5	10
Sand ballast, ordinary charge, loaded alongside the wharf through the Breakwater Company, per ton	0	2	2
For every 1,000 kilos. (equal to 1 ton), freight discharged or loaded at the breakwater	0	16	0

Carenero Railway and Navigation Company

The port of Carenero is situated about 80 miles east of La Guaira, in a natural bay, sufficiently large to anchor a fleet of warships; this bay, from its position and natural advantages, will no doubt become in time the first port in the Republic of Venezuela. The Carenero Company runs a line of steamers from La Guaira to Carenero, where there is a pier and the railway terminus of the company, from whence the railway runs some 30 miles inland and to the town of Rio Chico, passing Higuerote station and Paparo station, the latter place being situated at the mouth of the River Tuy. The produce of this district is principally cocoa and coffee, and no doubt when this railway is extended to Altagracia de Orituco, on the plains in the interior of the State of Miranda, it will open up a most beautiful and fertile country, producing cocoa, coffee, corn, beans, tobacco, sugar, and other tropical fruits, which only awaits the means of transportation to have a ready market. The extension of this railway is at present constructed as far as El Guapo, at the foot of the Los Cerritos, a distance of some 15 miles further inland than the town of Rio Chico, and from this point it begins to ascend the hills. The company is now busily working on this portion.

Annex A.—PRINCIPAL Foreign Articles Imported at the Port of La Guaira during the Year 1893.

From—	Articles.
England	Machinery, boilers, hardware, copper, caustic-soda, zinc, tin-plates, nails, stoves, iron pots, iron in bars, &c.
England and Germany.. ..	Rice, beer, biscuits, cement, dry goods, paper, canned meats, empty demijohns
Germany and United States of America	Potatoes, earthenware, perfumeries, furniture, codfish, salted fish, glassware, sausages, &c.
United States of America ..	Flour, corn, lard, resin, paint, hams and bacon, beans, peas, pitch-pine in logs, cordage, tallow, maizena, kerosine, and preserved meats
Holland	Stearine and cheese
France, Spain, and Italy ..	Sardines in oil, oil, raisins, olives, capers, nuts, wines, liquors, and other provisions

Annex B.—Return of Principal Articles Received from Other Parts of Venezuela for the Use of La Guaira during the Year 1893.

Articles.	Where from—		Quantity.	Price. From—	Price. To—
				£ s. d.	£ s.
Bananas	The coast near La Guaira ...	Number	100	0 5 0	...
Beans	Coro, Maracaibo, and Margarita	Lbs. ...	212	2 8 0	3 5
Cheese	Barcelona	,, ...	100	2 10 0	...
,, ...	Coro	,, ...	100	3 0 0	...
Cocoanut oil ...	Barcelona	Bottle ...	1	0 0 6	...
Corn	Coro and Maracaibo	Lbs. ...	212	1 2 0	...
Onions	Margarita and Maturin ...	,, ...	150	3 0 0	...
Potatoes	The mountains near La Guaira	,, ...	150	2 0 0	...
Rum (produce of the sugar-cane)...	Maracaibo and Carupano ...	Bottles ...	80	2 0 0	2 4
Salt	Coche, Araya, and Margarita	Lbs. ...	300	1 0 0	1 5
Salted beef and pork	Barcelona and Coro	,, ...	100	1 10 0	2 0
Salted fish	Margarita	,, ...	100	1 0 0	2 0
Starch	Margarita and Maturin ...	,, ...	100	1 0 0	...
Sugar—					
Brown	The sugar plantations near La Guaira	,, ...	80	2 0 0	2 8
Refined	Guatire, interior of Caracas ...	,, ...	100	2 15 0	3 0
Tobacco	Maturin	,, ...	100	1 15 0	3 0
,, ...	Maracaibo and Capadare ...	,, ...	100	2 15 0	5 0
Wood, cedar ...	Maracaibo	...	...	...	...
Live animals—					
Pigs ...	Barcelona, Rio Chico, and Orchilla Islands	...	...	...	...
Poultry ...					
Goats, &c.					

Annex C.—Amount of Duties paid to the Custom-house of La Guaira during the Year 1893.

	Amount.
	£
For goods imported	780,000
,, exported	98,500
Total	878,500

ANNEX D.—ARRIVAL and Departure of Steamers at the Port of La Guaira during the Year 1893.

Nationality.	Names of the Several Companies.	From—	Arrivals during the Month.	Route.
British	Royal Mail Steam Packet Company (with passengers)	Southampton ..	1	Touches at several British West India Islands, and two days after arrival at this port returning by the same route
	Royal Mail Steam Packet Company (with cargo)	„	1	From here to Jamaica, and returns to Southampton viâ Barbadoes
	West Indian Line	Liverpool	2	Arriving here every 10 days; their route is Liverpool, Barbadoes, port of Spain, La Guaira, Puerto Cabello, Curaçao, Colombian ports, New Orleans, and return to Liverpool
	Harrison Line	„	1	
	Princes Line	..	..	No special route; they come whenever they get cargo for this port from France, Spain, Italy, or United States of America
	Scratton Sons and Company ..	Hamburg	..	This steamship has been twice in port this year
German	Hamburg Amerikanische Packetfahrt Actien Gesellschaft	„	2	Returns here from Colombian ports for cargo and passengers, and leaves for Europe viâ Puerto Rico and St. Thomas
American	Red D Line	New York	3	Every 10 days, returning from Curaçao for mail and passengers for New York
Dutch	Königliche West Indishe Maildienst	Amsterdam. .	1	Going to all Venezuelan ports, less Maracaibo and Ciudad Bolivar
		New York	1	
French	Compagnie Générale Transatlantique	St. Nazaire	1	They return here from the Colombian ports for cargo, passengers, and mail, and touch at Port of Spain and Martinique on the way home
		Bordeaux	1	
		Marseilles	1	
Spanish	Compañia Transatlantica Española ..	Barcelona .. .	1	Coming from New York, Habana, and Colombian ports, they return by same route
Italian	La Veloce	Genoa	1	St. Thomas, Venezuelan and Colombian ports

Sailing vessels, mostly British, bring coal or patent fuel from Great Britain and lumber from the United States of America, leaving in ballast for Aruba or Orchilla to load guano.

Several small crafts and three small steamers belonging to the Carenero Navigation Company do the coasting trade with this port.

Puerto Cabello.

Mr. Acting Vice-Consul Thring reports as follows :—

During the past year a good business has developed, and gradually the traces of the last revolution are apparently being wiped out.

The movement of shipping shows, if anything, an increase against previous years. For 1893 the figures of arrivals of vessels from foreign ports are the following :—

Nationality.	Number of Vessels.	
	Steam.	Sailing.
British	87	7
American	74	6
French	68	..
German	43	1
Dutch	35	17
Spanish	12	2
Austrian	..	1
Russian	..	2
Norwegian	..	8
Danish	..	1
Total	319	45

The amount of import at this port has been as follows :—

From—	Value.		
	£	s.	d.
England	317,819	10	8
Germany	364,216	15	8
France	131,228	3	4
Spain	56,332	12	0
Holland	42,935	0	0
United States of America	297,520	17	3
„ Colombia	4,332	1	7
Uruguay	6,202	0	0
West Indian	450	7	2
Total	1,221,037	7	8
„ 1892	437,418	18	6
„ 1891	1,135,860	14	7

The export from this port is shown by the accompanying separate table.

With the prospects of a very large coffee crop for 1894, and a superabundance of cereals and corn, the outlook for the future is quite promising.

RETURN of Principal Articles of Export from Puerto Cabello during the Year 1893.

Country.	Coffee.	Cocoa.	Hides	Goat-skins.	Deer-skins.	Quina.	Sundry Produce.	Horns.	Starch.	Fresh Fruits.	Divi-divi	Copper Ores	Wood.	Specie Gold.	Value.
	Kilos.	Kilos.	Kilos.	Kilos.	Kilos.	Kilos.	Kilos.	Kilos.	Kilos.	Kilos.	Kilos.	Kilos.	Kilos.	Kilos.	£ s. d.
England	...	...	...	...	...	...	...	...	...	...	...	9,812,500	9,000	...	66,336 12 8
Germany	1,245,687	6,491	51,026	...	1,349	275	2,405	12,022	...	...	34,725	...	94,490	...	95,675 1 0
France	8,912,909	246,498	70,419	167	1,142	573	326	7,977	...	...	2,000	...	9,780	...	637,290 15 5
Spain	...	12,806	...	...	...	...	...	...	...	...	...	...	...	...	1,066 16 0
Holland	15,168	657	7,400	...	...	...	...	...	...	...	...	...	...	...	1,333 18 0
United States of America ...	2,941,726	80	271,341	20,059	7,200	...	795	...	1,537	104,833	5,200	5,241,746	...	197·625	276,820 19 0
West Indies ...	13,350	...	800	...	...	...	19,476	...	6,579	166,156	...	1,700	158,445	...	3,442 14 8
Italy ...	900	...	...	...	...	...	...	..	...	...	...	...	...	...	62 14 8
Denmark	15,000	...	...	...	...	...	...	...	...	...	...	...	...	...	1,108 18 3
Total	13,144,451	266,591	400,986	20,226	9,691	848	23,002	19,999	8,116	270,989	41,925	15,055,946	271,705	197·625	1,083,188 9 8

NOTE.—The 4,857 kilos of Fresh Fruits exported to the United States are all cocoanuts, and the 166,156 kilos to the West Indies are bananas, &c. The 158,445 kilos. of wood to the West Indies are exclusively for naval construction.

Ciudad Bolivar.

Mr. Vice-Consul de Lemos reports as follows:—

Annexed will be found the usual statistical tables on the trade and commerce of this vice-consular district for the year 1893 as follows:—

A.—Return of exports from the port of Ciudad Bolivar.

B.—Table showing comparative values of exports for the years 1890–93.

C.—Table showing yield of gold from the Yuruari district during the years 1884–93.

D.—Return of British and foreign shipping at the port of Ciudad Bolivar.

E.—Total value of imports and custom-house duties levied.

F.—Table showing comparative values of imports and custom-house duties for the years 1884–93.

It will be observed that, although the commercial activity of this port has recovered to some extent after the termination of the civil war in 1892, the same has not yet reached previous years, especially in regard to the value of the imports.

The new mining code promulgated in March, 1893, which undoubtedly is most liberal in its provisions, has favourably influenced the mining industry during the past year. It may be anticipated that during 1894 work in the Yuruari mining district will increase in activity, and that several abandoned properties will again be taken up and worked.

At present the only mines which are being worked are the Potosi, Colombia, and El Callao mines.

During 1893 the steamers "Libertador" and "Masparro" have made several trips from here to Orocué, situated on the River Meta, in Colombia. The Venezuelan Government having granted certain facilities for the transit of goods to Colombia, it is expected that this trade will grow in importance, and that eventually goods and merchandise will be carried by this route to Bogota, while Colombian produce will be exported through this port. Both the "Libertador" and "Masparro" are shallow stern-wheel steamers; the former was built by Messrs. Yarrow, of Poplar, and the latter by a Wilmington (U.S.) firm.

The non-existence of a bank or other credit establishment, referred to in my previous report, is a want most severely felt in commercial circles. It undoubtedly contributes to the absence of greater commercial enterprise in this district.

Annex A.—RETURN of Exports from the Port of Ciudad Bolivar during the Year 1893.

Articles.		Quantity.	Value.
			£
Asses	Number ..	420	679
Balsam copaiba..	Lbs.	20,912	1,230
Cattle, live	Number ..	9,541	38,760
Cheese	Lbs.	6,886	102
Cocoa	„	68,152	1,914
Coffee	„	1,420,616	47,193
Deerskins	Number ..	34,125	1,625
Feathers	Lbs.	5,028	19,760
Goatskins	Number ..	8,000	436
Gold	Troy ounces ..	47,950	185,217
Gold coin	..	..	24,637
Hides	Number ..	68,801	22,553
Horses and mules	„ ..	76	815
Indigo	Lbs.	350	17
Rubber	„	183,230	20,732
Simaruba	„	10,244	144
Tigerskins	Bales.. ..	8	39
Tobacco..	Lbs.	157,496	2,179
Tonga beans	„	56,962	11,113
Other articles	„	30,094	784
Total	..	..	379,929

Annex B.—TABLE showing Comparative Values of Exports during the Years 1890–93.

	Value.			
	1890.	1891.	1892.	1893.
	Bolivares.	Bolivares.	Bolivares.	Bolivares.
Value of produce, &c. (gold bullion excepted)	3,532,710	4,674,320	3,256,907	4,867,824
Value of gold bullion ..	8,125,445	4,708,800	4,261,757	4,630,421
Total	11,658,155	9,383,120	7,518,664	9,498,245
Equivalent in Sterling £	466,326	375,325	300,747	379,929

Annex C.—TABLE showing Yield of Gold from the Yuruari District during the Years 1884–93.

Year.	Amount.
	Troy ounces.
1884..	233,935·37
1885..	172,037·85
1886..	217,135·07
1887..	95,352·0
1888..	71,594·33
1889..	88,834·0
1890..	85,531·0
1891..	49,050·0
1892..	46,560·0
1893..	47,950·0

Annex D.—RETURN of British and Foreign Shipping at the Port of Ciudad Bolivar during the Year 1893.

ENTERED.

Nationality.	With Cargoes.		In Ballast.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	5	4,140	...	...	5	4,140
American	1	346	...	...	1	346
Colombian	1	126	...	...	1	126
French	2	424	9	1,818	11	2,242
German	4	1,200	...	...	4	1,200
Venezuelan ...	34	12,993	7	844	41	13,737
Total	47	19,229	16	2,662	63	21,791

CLEARED.

Nationality.	With Cargoes.		In Ballast.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	5	4,140	...	...	5	4,140
French	10	2,020	1	222	11	2,242
German	...	...	3	954	3	954
Venezuelan ...	38	15,089	15	1,700	53	16,789
Total	53	21,249	19	2,876	72	24,125

Annex E.—TABLE showing Total Value of Imports at Ciudad Bolivar and Custom-House Duties Levied during the Year 1893.

Country.	Value of Imports.		Duties Paid.	
	Bolivares	c.	Bolivares	c.
Trinidad, British West Indies ..	4,053,952	80	1,793,945	32
Demerara	3,074	65	2,252	23
France	137,517	0	20,795	0
Germany	626,472	80	322,693	31
United States	576,076	75	287,579	70
12½ per cent. transit duty ..	..		294,325	52
Goods in transit to Colombia ..	26,104	32	250	94
Total	5,423,198	32	2,671,522	2
Equivalent in sterling £	216,927		106,861	

Annex F.—COMPARATIVE Table of Imports and Custom-House Duties for the Years 1884–93.

Year.	Value of Imports.				Duties Paid.			
	Currency.		Sterling.		Currency.		Sterling.	
	Bolivares	c.	£	s. d.	Bolivares	c.	£	s. d.
1884	11,761,258	40	470,450	0 0	4,133,193	77	165,730	15 6
1885	9,431,296	2	376,531	17 6	3,977,672	50	159,068	18 6
1886	7,460,243	89	298,410	0 0	2,786,515	66	112,160	12 6
1887	6,803,000	0	272,120	0 0	2,517,295	0	100,691	16 0
1888	6,842,833	0	273,713	0 0	2,604,365	0	107,744	0 0
1889	6,918,433	31	276,737	0 0	2,927,284	13	117,089	0 0
1892	3,728,356	0	149,142	0 0	1,746,417	9	69,856	0 0
1893	5,423,198	32	216,927	0 0	2,671,522	0	106,861	0 0

BARCELONA.

Mr. Vice-Consul Taurel reports as follows:—

Desirous of forwarding statistical tables of imports, exports, arrival and departure of vessels during the past year, I applied at the custom-house for the items, but all the documents having been sent to the Ministry at Caracas, I could not obtain them.

A severe depression of trade has been felt during the past year owing to the last civil war, which for a long time deprived agriculture of many hands. During the last months a marked improvement has been felt.

There has been a very considerable increase in custom-house duties, owing to direct trade with Europe and the United States of America. Imports were before effected viâ Puerto Cabello and La Guaira, and the goods shipped at these ports on board Venezuelan sailing vessels, but now that the steamers of the

Dutch West Indies Royal Mail call here regularly, goods come direct from Europe and the United States.

Hopes are entertained that the coal mines at Naricual, belonging to an English company (the Guanta Company, Limited), will contribute to increase commerce. The quality of the coals is said to be splendid, but the supply is not yet sufficient to meet the requirements. It is expected that it will increase considerably with the use of adequate machinery, which is expected. The cheap price the company will be able to sell at will surely encourage many steamship companies to buy it, taking also into account the facilities and safety of the Guanta harbour, where a nice wharf has been constructed by the same company.

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1339.	Boston	1½d.	1499.	Dunkirk	1d.
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1359.	Cadiz	1½d.	1419.	Berlin	1½d.
1360.	Marseilles	1½d.	1420.	Nice	3d.
1361.	Brest	1d.	1421.	Yokohama	1½d.

No. 1422.

Reference to previous Report, Annual Series No. 1207 (*p.* 9).

VENEZUELA.

MARACAIBO.

Mr. Andral to the Earl of Kimberley.

My Lord, *Caracas, May* 23, 1894.

I HAVE the honour to inclose Mr. Vice-Consul Meyer's Commercial Report for the year 1893.

I have, &c.

(Signed) WM. A. ANDRAL.

Report on the Trade and Commerce of Maracaibo for the Year 1893.

ABSTRACT of Contents.

	PAGE
Shipping	2
Exports	2
Coffee	2
Mails	3
Freights	3
Steamers	3
Railways	3
Petroleum	4
Shipping	5
Tables	6, 7

General Remarks.

My report for the year 1892 referred to the effects of the revolution of that year, and I am glad to be able to state that the last year, 1893, has pretty well shown the exactness of my anticipations.

Commercial transactions on credit followed their customary course throughout the year, and not many serious losses are to be registered, probably in consequence of more cautious operations by our commerce due to the uneasy feeling as to the results of any disturbance.

Shipping.

The accompanying statement of arrivals of vessels at this port during the year 1893 shows an increase of the British flag as compared with 1892. This increase is due to the arrival of the British steamer "Hollinside," chartered by the Red D Line from New York to this port. Said steamer's charter has not been renewed for the present year.

The British sailing vessels arrived from Malaga, Barbadoes, Bordeaux, Hamburg, and Marseilles.

The entrance to the Lake of Maracaibo is very shallow, vessels should not attempt to cross the outer bar on more than the 10½ feet draught. I may state here that the access to the lake over the bar is entirely different from what is stated on the Admiralty chart published on November 20, 1876. I have requested the Captain of the Red D Line steamer to take exact note of the inaccuracies of the chart, and shall have the pleasure to report the results of my investigations ere long. The island of Bajo Seco is entirely united with the coast of the mainland. One can now walk across safely where formerly vessels would anchor when they could not attempt to go out over the bar on account of heavy seas.

Exports.

Exports have increased considerably when compared with last year, only those of cocoa, Peruvian bark, hides and goatskins have diminished.

Coffee. Coffee, the principal article exported from Maracaibo, shows a steady increase in exports. During 1892 365,186 bags were exported, whilst the last year shows an export of 383,013 bags, which cost about 10,500,000 pesos, equal to about 1,664,000*l*. The steady increase of exports of coffee from here is due to the fact that all the new plantations from the years 1886 to 1888, when prices of coffee improved greatly, are now yielding their crops. From an important hacendado (coffee planter) I heard some days ago that in the Tachira district alone about 4,000 quintals of coffee were lost every year for want of labourers to harvest in time.

Labour. From this it would appear that exports could be always increased if only sufficient labourers could be had to harvest the crops and make new plantations, for which plenty of good soil is at hand.

The coffee exported from Maracaibo has been sold principally in Havre and Hamburg, where the excellent quality is very much appreciated now. The New York market, formerly nearly the sole consumer of Maracaibo, has lost its importance, and coffee from here mostly only passes through New York on its way to Europe. This fact will, of course, change very considerably as soon as the United States take away the 3 cents duty per pound

on Venezuelan coffee or impose an equal duty on all coffee imported there.

Mail. The Red D Line Steamship Company from New York kept up an excellent service between New York, Curaçao, Puerto Cabello, La Guaira, La Vela de Coro and Maracaibo. From here, every 10 to 11 days, the branch steamer leaves for Curaçao, connecting with the main line there, and besides, once a month a direct steamer is despatched between Maracaibo, Curaçao and New York. Mails despatched from Europe have arrived viâ New York in Maracaibo on the 17th day.

Freights. The Red D Line established agencies in the principal European ports, in Liverpool Messrs. Widow, Durantz and Sons, with good success; goods have arrived in Maracaibo on the 17th day after signing the bill of lading at Liverpool, which is bound to be very satisfactory to shippers.

Exports of hides, goatskins, cocoa, Peruvian bark and brown sugar have been less than previous year in consequence of unfavourable markets abroad.

Fustic shows a much better export in 1893 as compared with the previous year.

Dividivi was exported very freely as may be seen by the following figures:—

Year.	Quantity.	
	Kilos.	Tons.
In 1892	691,904	692
1893	3,481,917	3,482

Steamers and railways. Navigation on the lake, besides numerous small sailing vessels, is well kept up by three steamers. The "Progreso" running between Maracaibo and Encontrados, connecting there with three stern-wheel river steam-launches of very light draught. They carry mail passengers and freight between Encontrados, Puerto Tachira, Villamizar. Puerto Tachira is situated on the frontier of Colombia, whilst Puerto Villamizar is on the Colombian territory. This latter, the most important port on the river, is connected by railway with Cucuta, and considerable amount of freight passes over that route.

The "Los Andes" connects Maracaibo with La Ceiba, Staate Los Andes. The railway from La Ceiba to Sabana de Mendoza has been, so far, continued as far as Motatan, and will be open to traffic next month to that place.

The "Santa Barbara," from Maracaibo to Santa Barbara whence the railroad commences, to Merida. This railroad has so far been open to traffic up to "El Vigia," and has not been built any further.

Works on the new railroad from Encontrados to La Fria are going on. As previously reported, this railway is intended to

connect the port Encontrados, where lake steamers can go all the year round, with Colon and San Cristobal. The line has been cleared for 27·500 kiloms., the ground is now levelled for 26 kiloms., rails are laid for 16 kiloms.

Petroleum.

Mr. R. M. Maldonado, director of the "Compañia Nacional Petrolia del Tachira" furnishes me the following data about that company:—

1. The Company was established in 1882, and in 1884 received from the Government of Venezuela the corresponding authorisation to work the mines for 50 years, to be extended for 49 years more.

2. The lands of the company comprise an area of 100 hectares, the temperature is from 15 to 20 centigrades; climate healthy; the little river Quinimari on foot of the possession, and the quebrada "Alquitrana" passes the land.

3. The oil is impregnated in the soil, several veins are known at different depths, and the geological composition of the soil is the same as the Pennsylvania oil districts according to excavations and examinations made.

4. Inflammable gases are coming out of the ground very abundantly.

5. The petroleum is actually gathered in superficial wells, in small quantities only, because the company does not possess the machinery to work on a big scale.

6. The mines are situated 18 millas (about 50 miles) from San José de Cucuta.

7. Consumers of the mines' oil will be Tachira of the State Los Andes, Venezuela; Santander of the Republic Colombia; and will be extended surely to Zulia, Trajillo, and Merida if the railway to Encontrados is finished.

8. Since the products of the mines do not pay duties in Colombia, according to commercial treaty between Venezuela and Colombia, the importation to Colombia is very much favoured.

9. The products of the mines are sold now in San Cristobal and Rubio as follows:—

Articles.	Price per Gallon.
	Bolivars.
Kerosene..	3·50
Benzine	2
Carbolineo	2
Tar	1

These prices are obtained without any difficulty and can easily be reduced to an extent to exclude competition of kerosene from the exterior. (In Venezuela kerosene pays a duty of 28 bs. 12 c. the 100 kilos. gross weight.)

On the same grounds of the company abundant coal mines exist, from one of which the fuel used by the company is taken.

ARRIVALS of Vessels at the Port of Maracaibo during the Year ending December 31, 1893.

Flag.	Steamers.	Brigs.	Schooners.	Barks.	Total.
British	8	1	7	..	16
American	38	..	6	..	44
French	..	2	..	1	3
German	..	6	..	3	9
Dutch	..	..	11	..	11
Italian	..	..	..	2	2
Danish	..	12	..	4	16
Norwegian	..	..	..	1	1
Colombian	..	..	1	..	1
Venezuelan.. ..	..	..	22	..	22
Total	46	21	47	11	125

General Produce from Maracaibo during the Year 1893.

Date.	Coffee.		Cocoa.		Peruvian Bark.		Hides.		Goatskins.	
	Bags.	Kilos.	Bags.	Kilos.	Packages.	Kilos.	Number.	Kilos.	Packages.	Kilos.
1893—										
January	26,692	1,600,972	1	23	..	..	27	291	72	6,431
February ..	35,398	2,148,094	..	..	2	96	596	6,997	44	3,922
March	42,479	2,578,432	101	4,655	..	..	257	2,773	75	6,723
April	47,367	2,866,592	..	..	49	2,450	278	2,797	55	5,016
May	37,562	2,258,243	268	11,909	2	100	843	1,385	80	7,197
June	24,702	1,463,953	416	18,087	..	..	1,848	24,641	71	6,327
July	34,599	2,064,153	68	2,889	28	1,282	921	11,306	30	2,756
August	33,369	2,014,858	39	1,828	..	..	1,072	13,373	41	3,613
September ..	28,390	1,718,738	..	..	..	..	601	8,194	104	8,883
October	24,588	1,472,872	..	..	..	..	..	..	..	..
November ..	19,732	1,192,360	..	..	..	..	1,951	23,614	45	3,739
December ..	27,835	1,692,679	..	..	..	..	544	6,529	79	6,715
Total ..	383,013	23,072,484	893	39,391	81	3,928	8,938	101,900	696	61,322

GENERAL Produce from Maracaibo during the Year 1893—continued.

Date.	Copaiba.		Fustic, &c.	Dividivi.	Fish Sounds.		Brown Sugar.		Deerskins.	
	Packages.	Kilos.	Kilos.	Kilos.	Packages.	Kilos.	Packages.	Kilos.	Packages.	Kilos.
1893—										
January	26	1,050	604,574	17,940	27	2,366	86	3,896	2	223
February.. ..	34	1,413	410,564	523,042	53	4,791	221	10,147	3	289
March	27	1,190	4 2,355	602,849	93	7,067	429	16,340	5	548
April	39	1,489	602,259	..	10	808	..	..	15	1,378
May	20	843	453,250	695,880	14	1,352	40	1,840	6	697
June	..	..	1,431,296	901,330	6	528	..	..	3	384
July	39	1,655	1,579,832	34,599	4	235	74	3,400	3	372
August	..	..	56,120	135,287	13	1,019	99	3,354	4	478
September ..	..	..	651,434	174,202	9	914	491	19,800	6	538
October	..	..	699,021	95,536	..	..	452	20,842	..	..
November ..	..	..	72,150	153,420	11	1,115	486	23,096	1	103
December ..	..	..	384,055	147,832	2	220	522	23,532	5	469
Total ..	185	7,640	7,346,910	3,481,917	242	20,415	2,900	126,247	53	5,479

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1894.

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DIPLOMATIC AND CONSULAR REPORTS ON TRADE AND FINANCE.

WESTERN PACIFIC.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF SAMOA.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1262.

Presented to both Houses of Parliament by Command of Her Majesty,
AUGUST, 1894.

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No. 1458.

Reference to previous Report, Annual Series No. 1262

WESTERN PACIFIC.

SAMOA.

Consul Cusack-Smith to the Earl of Kimberley.

My Lord, *Samoa, May* 22, 1894.

I HAVE the honour to forward, my Annual Report upon the Trade of Samoa. The war here has somewhat delayed its preparation.

I have, &c.
(Signed) T. B. CUSACK-SMITH.

Report on the Trade and Commerce of Samoa for the Year 1893.

ABSTRACT of Contents.

	PAGE
Shipping and navigation	2
Trade and commerce	3
Notes on German trade..	5
General remarks..	9

General Review.

Review of trade.

The imports show an increase over the preceding year of 932*l.*

The exports on the contrary have decreased by over 2,000*l.*

It must however, be borne in mind that during almost the whole year the natives were either preparing for war or were actively engaged in hostilities, and that, in consequence, commercial progress was impossible.

Trade was also seriously affected by the critical state of the finances of the Samoan Government, for although a large part of the year's taxes were collected in the latter end of 1893, the money so obtained had to be expended in defraying the pressing liabilities of the Samoan Government

The Government was consequently obliged to dismiss nearly all its officials, and had no funds available for opening up the Islands to trade by means of roads and other sorely needed public works.

Shipping and Navigation.

Decrease in arrivals and tonnage.

The number of vessels of all nations which arrived at Apia, exclusive of men-of-war, in the year 1893, was 81, with a total of 74,955 tons, being a decrease of 23 vessels and 10,610 tons compared with the preceding year.

American tonnage.

American tonnage which is mainly dependent upon the two ocean liners which call at Apia, remains almost the same as in 1892.

British tonnage.

British tonnage is 2,000 tons less than last year. The total is mainly due to the Union Steamship Company of New Zealand's steamer "Upolu," which practically carries nearly all the import trade of Samoa. The "Upolu" will be replaced in 1894 by a larger vessel. One of the Ocean liners also flies British colours and is finding increasing favour as a cargo boat, owing to her hydraulic lifts for loading and unloading goods.

German tonnage.

German tonnage has decreased by 15 vessels and 8,000 tons. During the year the Norddeutscher-Lloyd steamer "Lubeck" was transferred to New Guinea, and there is now no German steam communication with Samoa. Of late the "Lubeck" had been losing money heavily on every trip.

RETURN of all Shipping Entered at the Port of Apia during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
American	4	705	17	32,963	21	33,668
British	5	750	21	26,175	26	26,925
German	21	2,735	4	6,687	25	9,432
Danish	1	348	...	...	1	348
Norwegian and Swedish	7	218	...	...	7	218
Other nations ...	1	374	...	...	1	374
Total	39	9,130	42	66,825	81	74,955

British shipping since 1889

The following figures compare the British shipping entering the port of Apia during the past four years:—

Year.	Sailing.		Steam		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
1890	10	683	23	9,833	33	10,496
1891	14	1,602	27	18,422	41	20,024
1892	5	599	25	28,437	30	28,936
1893	5	750	21	26,175	26	26,925

From the following table it will be noticed that the seaborne trade of Germany has decreased by no less than 12,888*l.*, while on the other hand British seaborne trade shows a total increase of 14,804*l.* Sea-borne trade compared. German decrease.

America secured 5,147*l.* more seaborne trade than in the previous year. British increase.

COMPARATIVE Table showing the Total Trade Carried in Vessels of Various Nationalities during the Years 1892–93.

Nationality.	Imports.		Exports.	
	1892.	1893.	1892.	1893.
	£	£	£	£
British	21,175	36,669	700	710
German..	32,513*	15,410*	7,468*	11,683*
American	8,821*	14,627*	684	25
Danish	4,098	..	6,727*	5 587*
Norwegian	10	1,542	18,938*	16,319*

* Includes copra imported from islands other than Samoa for re-exportation.

Trade and Commerce.

At the close of 1893 an important British firm established an agency for the purchase of copra in Samoa. British agency established.

The following table shows that there was a decrease in the volume of the exports and an increase in the imports:— Imports and exports compared.

Year.	Value.	
	Exports.	Imports.
	£	£
1890	20,509	43,626
1891	34,647	70,712
1892	36,356	67,318
1893	34,326	68,250

From the following table it will be seen that of the imports more than half came from Great Britain and her colonies; this preponderance was fairly maintained as compared with the year 1892. Preponderance of British trade maintained.

COMPARATIVE Table showing the Total Value of all Articles Imported to and Exported from Samoa to and from Foreign Countries during the Years 1891–92.

Country.	Imports.		Exports.	
	1892.	1893.	1892.	1893.
	£	£	£	£
Great Britain and colonies	39,259	38,162	244	3,158
Germany and colonies..	14,340	14,792	655	7,557
United States	9,689	12,566	251	..
Tonga	886	298	782	645
Other South Sea islands	115	1,047	728	525
Denmark	228	587	..	..
Portugal (for orders) ..	..	..	27,939*	18,733*
Ships' stores	..	15	..	1,592
Copra in transit ..	2,798	2,212	2,698	2,211
Total, including fractions omitted above	67,318	68,250	36,356	34,326

* The greater part of this should be credited to Germany.

Dutiable articles.

TABLE showing Amount of Principal Dutiable Articles Imported during the Years 1891–92.

Articles.		Amount Imported in 1892.	Amount Imported in 1893.
Beer and porter	Gallons ..	8,197	12,910
Spirits	„ ..	1,824	3,421
Wines	„ ..	1,297	1,840
Sparkling wine	„ ..	88	132
Tobacco	Lbs. ..	1,902	20,674
Cigars	„ ..	566	931
Gunpowder	„ ..	2,936	4,230
Sporting arms	Number ..	79	167

Copra.

The declared value of copra exported in 1893 amounted to 27,987*l.* as against 27,281*l.* the previous year.

Cotton.

The declared value of the cotton exported amounted to 2,188*l.*, in 1892 it amounted to 1,355*l.*

Coffee.

The declared value of the coffee exported was 425*l.*, as compared with 378*l.* in 1892.

It is stated that the large German firm here has permanently closed its cotton ginning establishment, and abandoned the cultivation of coffee.

British exports.

There is a considerable increase in the British exports, the total of 3,158*l.* comparing with 244*l.* in 1892, 781*l.* in 1891, and 1,165*l.* in 1890.

Of this total Great Britain (Liverpool) took 2,748*l.*; New Zealand, 372*l.*; and Australia 40*l.*

The direct imports from Great Britain increased from 46*l.* in the year 1892 to 480*l.* in the past year. New Zealand sent goods to the value of 23,584*l.*, an increase of 4,900*l.* over the previous year. Australia sent 14,098*l.*, a decrease of 6,430*l.* compared with 1892. British imports

It is greatly to be regretted that, despite the power given by the Treaty of Berlin to check the importation of arms, so large an increase in the importation of sporting arms should have occurred.

It is difficult to understand how so small a foreign population, few of whom indulge in shooting as a sport, could require in 2 years 246 sporting arms, most of which, it is to be feared, are rifles, which eventually find their way into the hands of natives.

The large increase also in the import of gunpowder can scarcely be accounted for by the wants of the foreign population.

The building trade has been fairly busy during 1893, and many houses of a greatly improved type have been erected. Building trade.

The town of Apia has been considerably extended, several new roads having been completed, and a large amount of clearing done. New roads and clearings.

A new wooden bridge for vehicular traffic was erected over the Mulivai River, in Apia, by an English contractor. Bridge erected.

A large number of fine boats, pulling from 8 to 26 oars, and carrying, some of them, nearly 100 men, were built by local boat-builders, most of whom are half-castes. Boat-building.

Nearly the whole of the lumber used in Samoa is at present imported from America.

A large part of this trade might probably be secured by New Zealand, Australia, or Canada, by arranging that specimens of colonial lumber, colonial-made doors, window-frames, ornamental woodwork, and other building materials suitable for this climate might be on view in Samoa.

Several wooden or iron bridges will probably be erected during 1894 or 1895.

NOTE upon the Relative Positions of Great Britain and Germany in Samoa as regards Trade, &c.

Trade, Shipping, and Navigation.

The table on page 2 shows that 25 German vessels entered the port of Apia, with a total tonnage of 9,432 tons, as compared with 26 British entries, giving a tonnage of 26,925 tons. German entries in 1893 decreased.

Copra trade.

Since the withdrawal of Messrs. McArthur and Co. from business in Samoa, the British traders have been obliged to sell their copra to the two German firms who alone ship copra for exportation.

Now a British firm is once more purchasing copra for shipment, and Messrs. Henderson Macfarlane's steamers will in future call twice a year at Samoa for this purpose.

In addition to this an important Australian firm are steadily purchasing copra through an American commission agent here.

But there is no question that in the export of copra the Deutsche Handels firm, owing to its large plantations, will continue to be by far the largest exporter.

Coffee.

The export of coffee, of which the German firm (Deutsche Handels) had the monopoly, has been abandoned, and the coffee plantation destroyed.

Cotton.

The Deutsche Handels firm having closed its large cotton ginning house, it is probable that but little cotton will for the present be exported by German firms.

Sea-borne trade: German decrease. British increase. German tonnage decreased.

In 1893 the sea-borne trade of Germany decreased by 12,888*l.*, while that of Great Britain increased by 14,804*l.*

The entries of ships flying German colours in 1893 show a decrease of 15 vessels and 8,000 tons, due to the transfer of the Norddeutscher-Lloyd's steamer "Lubeck" to the New Guinea line. The "Lubeck" for the last 4 years was said to be losing money on every trip.

Both in tonnage and number of ships Great Britain headed Germany in 1893.

British preponderance in sea-borne trade.

In seaborne trade, including imports and exports, during 1893, Great Britain surpassed Germany by no less than 10,286*l.*

Preponderance of imports come from Great Britain and her colonies. Exports to Germany preponderate.

In 1893, of the total trade, export and import, of Samoa, Great Britain and her colonies claimed 41,320*l.*, as against Germany's 22,349*l.*

Of the exports Germany took 7,557*l.*, while Great Britain and colonies took 3,158*l.*

Taxes Paid in 1893.

Table of taxes paid in 1893.

The following table, prepared by the customs officials here, at the request of the German consul, is full of interest:—

Taxes Paid in 1893.

	C. 1. Native Capitation Tax.	C. 2. Coloured Plantation Labourers.	C. 3. Boats.	C. 4. Firearms.	C. 5. Dwelling Houses, and Houses and Land used for Commercial Purposes.	C. 6. Traders' Stores.	D.	E. Licenses for Professions and Trades.	Totals.
	£ s.	£ s.	£ s.	£ s.	£ s.	£ s.	£ s.	£ s.	£ s.
To Samoan Government.									
By Germans	..	433 4	19 4	1 16	33 16	39 12	..	9 12	537 4
British	..	.. *	29 4	7 8	64 8	44 8	..	26 8	171 16
Americans	..	1 12	4 8	0 12	5 12	14 8	..	1 12	28 4
Other nationalities, including Samoans	4,189 12	..	15 12	1 4	25 0	13 4	..	22 0	4,266 12
To Municipality of Apia.									
By Germans	11 4	..	10 8	1 4	160 16	72 16	..	162 12	419 0
British	0 8	0 8	5 12	2 8	91 0	46 16	..	165 8	312 0
Americans	..	1 12	1 11	0 8	46 8	25 4	..	33 8	108 12
Other nationalities	..	..	4 0	..	53 0	21 12	0 18	72 8	151 16

Outside municipality: British preponderance under all heads.

Of the foreigners residing outside the municipality, British subjects pay considerably more for boats, firearms, dwelling-houses, houses and lands used for commercial purposes, traders' stores, and licenses for trades and professions than do the Germans, the actual figures being: British, 171*l.*; and Germans, 104*l.*

Except labourers' tax.

In one item the Germans have no competition, viz., the capitation tax on coloured plantation labourers. Without this tax their total would fall short of the British total. It must also be remembered that the importation of coloured labour by British subjects in Samoa has been, if not actually forbidden, certainly not encouraged. It was not until January, 1894, that British subjects were permitted to recruit labour from the Gilbert Group upon the same conditions as the German firm.

Germans importing labourers under British license.

The Deutsche Handels firm has obtained license from me to import 120 Gilbert Islanders this year. They would otherwise find it very difficult to import suitable labourers.

Municipality of Apia.

Boats and firearms.

Turning to the municipality of Apia, the Germans pay twice as much for boats as the British, who, in their turn, pay twice as much for firearms as the Germans.

German preponderance for houses, &c.

For dwelling-houses, and houses and land used for commercial purposes, the Germans have a large preponderance, but it has to be remembered that the head-quarters of the Deutsche Handels firms is a series of great barns or barracks, far too large for the present trade of the firm, and covering a very large area of ground which is of no possible use except to graze cattle on; but as tramways cross it from one shed to another it is all taxed. The amount paid by the Deutsche Handels firm under this heading will probably be greatly reduced next year, as they have closed their large cotton ginning establishment.

Traders' stores: German preponderance.

The Germans, it will be seen, pay considerably more for traders' stores than the British in the municipality.

Licenses: British preponderance.

The British are slightly ahead in the matter of licenses for professions and trades.

German preponderance as regards taxes and licenses not double.

Taken at its greatest under this table, the German preponderance is not double the sum which the British pay as taxes upon their property and professions and trades in the whole of Samoa.

Taxes for all Samoa, including Municipality.

It is worth while noticing that if the totals paid in the municipality of Apia be added to those paid to the Samoan Government, the British have the preponderance in boats, firearms, and licenses, while the Germans have only a slight preponderance in traders' stores, and in dwelling-houses and land and houses used commercially.

General Remarks.

Of the total produce imported into Samoa more than half comes from Great Britain and her colonies. The exact figures are shown in the trade report. Country of origin of imports.

The Germans in Samoa in the year 1893 imported goods to the value of 33,415*l.*, as compared with 12,021*l.* imported by the British. Nationality of importers.

Of import duties the Germans paid, in 1893, 2,372*l.*, as compared with 473*l.* paid by the British. Import duties in 1893: German preponderance.

The whole of the export duties on copra, cotton, and coffee, amounting to 668*l.*, were paid in 1893 by Germans. Whole export duties German.

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ZANZIBAR.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF ZANZIBAR.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1194.

Presented to both Houses of Parliament by Command of Her Majesty, MAY, 1894.

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1347.	Algiers	3d.
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1349.	Cherbourg	1d.
1350.	Jerusalem	1d.
1351.	Santiago	1d.
1352.	San José	1d.
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1354.	Madrid	2d.
1355.	Teneriffe	½d.
1356.	Havana	2d.
1357.	Paraguay	5d.
1358.	Guayaquil	4½d.
1359.	Cadiz	1½d.
1360.	Marseilles	1½d.
1361.	Brest	1d
1362.	Syra	2½d.
1363.	Suakin	1d.
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ZANZIBAR.

ZANZIBAR.

Mr. W. B. Cracknall to the Earl of Kimberley.

My Lord, *Zanzibar, March* 31, 1894.

I HAVE the honour to transmit the Commercial Report for 1893 of Zanzibar, prepared and compiled by my directions by Mr. Vice-Consul Cave.

I have, &c.
(Signed) W. B. CRACKNALL.

Report on the Trade and Commerce of Zanzibar for the Year 1893.

ABSTRACT of Contents.

	PAGE
Introductory	2
Imports	2
Decrease in imports, reasons for	3
Imports from Sultan's dominions	3
,, Imperial British East Africa Company's ports	3
Cattle disease	3
Imports from foreign countries compared	4
Exports	4
Exports to foreign countries compared	5
,, Sultan's dominions	5
Irregularity of communication with Europe	5
Customs revenue	5
Clove crop	6
Desirability of experimental cultivation	7
Scarcity of labour	7
Tramway	7
Fibre-extracting mill	7
Chillies	8
Shipping returns	8
Harbour service	8
Lighthouses	8
Pemba Island	9
Concluding remarks	9

Introductory.

The statistics and summaries of the trade of Zanzibar for the year ended December 31, 1893, have been compiled by Mr. C. W. Strickland, collector of customs and revenue to the Government of His Highness the Sultan, on the same lines, and from the same sources as those for the year 1892, but they are, perhaps, of particular interest for two reasons. In the first place, it was only after the declaration of the free port in February, 1892, that the system was inaugurated of merchants filling up and signing declaration forms, supplied at the custom-house, showing the nature and value of all goods imported and exported by them, and consequently the returns for the month of January, 1892, could only be given in bulk and added to the totals at the end of each return. Since that time, however, the system of declaration forms has been followed with the most satisfactory results, and has enabled the statistics for the 12 months, which are dealt with in this report, to be compiled with greater accuracy and more fulness than in any previous corresponding period.

In the second place, it must be remembered, in comparing the results shown in these statistics with those for 1892, that in the month of January of that year Zanzibar had not yet been declared a free port, nor is it safe to base conclusions on results obtained immediately after the inauguration of a new system; it may fairly be said therefore that the present returns form the first reliable index of the effects which have resulted from the declaration of Zanzibar as a free port.

Annex I is a summary of the imports into the port of Zanzibar from all countries, including the produce of Zanzibar and Pemba Islands, which is brought to this port for shipment.

Annex II is a summary of all articles exported.

Annex III gives a general statement of the customs revenue derived from all sources, in comparison with the previous year.

Imports.

The total declared value of imports, including those from the Sultan's dominions, amounts to 183,48,151 rs.* (1,146,759*l.* 8*s.* 9*d.*), a decrease compared to last year of 6,17,129 rs. (38,570*l.* 11*s.* 3*d.*), and their distribution during the past two years is shown in the following table:—

* The average Indian rate of exchange for the year 1893 was slightly under 1*s.* 3*d.* per rupee, but for convenience of calculation it is reckoned throughout this report as equal to 1*s.* 3*d.*

To—	Value.	
	1893.	1892.
	Rupees.	Rupees.
a. Foreign countries	106,62,834	116,18,702
b. German coast	36,48,264	37,42,131
c. Sultan's dominions	29,67,742	29,44,566
d. Imperial British East Africa Company's ports	8,36,010	6,59,878
e. Benadir ports	2,33,301	..
Total	183,48,151	189,65,277

It will be observed that the imports from foreign countries and from the German coast show a decrease of 9,55,868 rs. and 93,867 rs. respectively, as compared with 1892, while, on the other hand, those from His Highness's dominions and the Imperial British East Africa Company's ports show an increase, and that the Benadir ports, which are placed separately for the first time, are responsible for imports to the extent of 2,33,301 rs.

Decrease in imports, reasons for.

In analysing the reasons for the decrease in imports we find, if we turn to the annexed summary, that the decline in the total value of piece-goods brought into this country amounts to 9,98,463 rs., which, for purposes of comparison, is almost identical with the 9,55,868 rs., which represents the total decrease in imports from foreign countries, and, further, we notice that the importation of this particular article from Asia has diminished to the extent of nearly 7 lacs of rupees. It is evident, therefore, that the decrease in the imports can be more than accounted for by the falling-off in the quantity of piece-goods brought into the country, principally from Bombay. The reason for this is not far to seek; during the previous year, when prices were low, large consignments of piece-goods were ordered from India by several local firms, and the supply has consequently exceeded the demand.

Imports from Sultan's dominions.

The increase in the imports from the dominions of His Highness the Sultan (5,23,176 rs.) is mostly satisfactory, as, although apparently small in itself, it shows in reality a large increase owing to the fact that the returns for the Benadir ports, which are now leased to an Italian company, have been shown separately, whereas, in previous years, they have been included under the heading of the Sultan's dominions.

Imports from Imperial British East Africa Company's ports.

The imports from the ports of the Imperial British East Africa Company show an increase of 1,76,132 rs., which can be mainly attributed to the larger quantity of ivory and rubber imported, there being a rise of 84,551 rs. and 42,844 rs. respectively, in the value of these two articles as compared to 1892. Hides, on the other hand, show a falling-off of 16,401 rs., owing to the disease which has of late caused such havoc among the herds of cattle throughout East Africa; it will probably be many years before the

Cattle disease.

country recovers from a scourge of which but little is known, and for which no remedy has been found.

Imports from foreign countries compared.

It will be observed that, of foreign countries, British India continues to head the list with imports into this country of the declared value of 48,63,603 rs. (303,975*l.* 3*s.* 9*d.*), owing chiefly to the large quantities of grain shipped annually from Bombay and Calcutta; Great Britain comes next with 15,00,688 rs. (93,793*l.*); and Germany third with 13,34,131 rs. (83,383*l.* 3*s.* 9*d.*).

The total value of imports into Zanzibar, as given in Annex I, "do not," as Mr. Strickland observes in his report, "represent the full activity of the port, on account of the large quantity of goods carried through in the several mail steamers monthly, and those transhipped direct from these steamers into the coasting vessels, in neither of which cases are they declared, and consequently the returns cannot possibly give a correct statement of the actual value of the port as a centre of trade in East Africa."

It should be observed that in Annex I, cloves are reckoned in frasilas of 35 lbs., the form in which they are brought into Zanzibar; while in Annex II they are counted in packages of 140 lbs., the form in which they are exported.

Exports.

Turning now to Annex II, it will be found that the total value of exports during the year 1893, to all parts of the world, amounts to 160,32,566 rs. (1,002,035*l.* 7*s.* 6*d.*), an increase of 15,03,997 rs. (93,999*l.* 16*s.* 3*d.*), as compared with the preceding year. They are distributed as follows:—

To—	Value.	
	1893.	1892.
	Rupees.	Rupees.
a. Foreign countries	94,04,165	88,91,487
b. German coast	45,76,214	37,39,389
c. Sultan's dominions	12,13,157	11,55,746
d. Imperial British East Africa Company's ports	7,51,752	7,51,946
e. Benadir ports	1,37,278	..
Total	160,32,566	145,28,168

An analysis of the statistical tables shows that the exportation of cloves has risen from 18,94,913 rs. in 1892, to 22,17,562 rs. in 1893, whilst copra has similarly risen from 9,67,611 rs. to 13,71,143 rs. The export of piece-goods again has increased to the extent of over 5 lacs of rs. which demonstrates the truth of the statement which was made in dealing with imports, that the Zanzibar market was over-stocked with this commodity. Ivory on the

other hand, shows a decrease of 5,99,937 rs., owing to the extremely low level to which prices have fallen, which has induced many merchants to hold their stocks over in expectation of a favourable turn in the market. The export of hides also, for the reasons already given, has diminished to the extent of 1,75,337 rs.

Exports to foreign countries compared.

With regard to exports also British India is in the first place with 32,28,153 rs. (201,759*l.* 11*s.* 3*d.*). Of European countries, Great Britain holds the lead by a total declared value of 17,88,889 rs. (111,805*l.* 11*s.* 3*d.*), while France stands second with 14,96,526 rs. (93,532*l.* 17*s.* 6*d.*), absorbing, as she does, almost the entire output of copra.

Exports to Sultan's dominions.

The value of exports to His Highness the Sultan's dominions has risen from 11,55,746 rs. in 1892 to 12,13,157 rs.; an increase of 57,411 rs., and this in spite of the fact that the shipments to the Benadir coast, which have previously been included under the heading of the Sultan's dominions, are now reckoned separately.

Irregularity of communication with Europe.

It may not be out of place to remark that exporters from Zanzibar labour under a great disadvantage in the irregularity of communication with Europe. With the exception of a very occasional private steamer, which, moreover, is not always in a position to accept extraneous cargo, there are only the three ordinary mail lines by which shipments can be made, the Portuguese mail service to East Africa having now been discontinued for a considerable period. Of these three lines the Messageries Maritimes runs monthly, leaving Zanzibar on the 3rd or 4th day of each month, while the boats of the German East African and of the British India Steamship Companies leave at regular intervals of 4 weeks, and always within a day or two of each other. It not unfrequently happens, therefore, that all these ships leave Zanzibar at approximately the same time, while for the rest of the month there is no communication with Europe whatever, and shippers have been known to prefer sending their goods by a much longer route viâ the Cape, rather than wait some weeks for a steamer proceeding directly homewards, with an additional uncertainty as to whether the vessel, if it is one which has called at southern ports on her way to Zanzibar, will not already have taken all the cargo which she is able to carry, and, in the case of the British India Company's steamers, with the added risks of transhipment and delay at Aden.

Customs revenue.

Clove crop.

It would be an incalculable boon to the trade of Zanzibar if some arrangement could be effected between the various lines of steamers, so that their departure from this port might occur at different and at more or less regular intervals.

Annex III shows the net income to the Government of Zanzibar derived directly through the custom-house. This amounts to 6,37,015 rs. (39,813*l.* 8*s.* 9*d.*), which is less by 14,124 rs. than the sum realised during the preceding 12 months. The reason to which this decrease may be mainly attributed is, that the duties which have been collected since the month of July, 1893, by the officials of the Italian Company at the ports of the Benadir coast,

and on their behalf at Zanzibar, cannot now be included in the statement of customs revenue, whereas in the compilation of previous statistics they have always been reckoned as one with the other sources of Government revenue. There is also a comparative decrease of 14,415 rs., on account of duty on goods imported from foreign countries, owing to the fact that the 5 per cent. duty was collected on imports during the month of January, 1892, before the declaration of Zanzibar as a free port, whereas no such duty was received during 1893. Again, there has been no duty collected on copper coins, which entails a comparative loss of 1,562 rs. The sale of cloves, on the other hand, on which duty is taken in kind, brought in 4,65,156 rs., or an increase of 7,424 rs., as compared with the year before; there is also an increase on account of wharf rent and a few other items.

Clove crop.

The receipts of duty in kind on cloves shows a falling-off of 9,848 frasilas (35 lbs.), but this must not be taken as an indication that the season's crop was a poor one; on the contrary, it has been above the average, and if it had not been for the heavy rains which we have experienced, and which have done considerable damage to many plantations, and the want of labour, most satisfactory results would have been obtained. The clove season is reckoned from September to March.

The prices of cloves fell from 3 dol. 65 c. per frasila for Zanzibar cloves, and 3 dol. 25 c. for Pemba cloves in the month of January, 1893, to 2 dol. 50 c. and 2 dol. 25 c. respectively in the month of December; there was a very slight upward tendency during the month of November, but at the time of writing, the market is lower than ever. Nor can this be wondered at, for not only does the demand seem to be diminishing rather than increasing, but the London market is overstocked to such an extent that there is reason to believe that it can supply all the clove-markets of the world for a period of 12 months; and in addition to this there is said to be a large quantity of cloves in Zanzibar at the present moment waiting for a favourable opportunity for shipment.

There is one other point which must not pass unnoticed, as it must of necessity have its influence, both on the present and on the future value of Zanzibar and Pemba cloves. The practice of adulterating the cloves with clove stems, that part of the tree joining the bud to the branch, has been recently becoming more and more general, especially at Chaki Chaki, the capital of the Island of Pemba, and it has a most injurious effect on the value of the sample. To prevent this it is proposed that His Highness the Sultan should issue a proclamation making any adulteration of this produce a punishable offence, and that the provisions of this proclamation should be extended to British subjects by an order made by Her Majesty's Diplomatic Agent and Consul-General under the Zanzibar Order in Council, 1888.

The facts which have been mentioned acquire additional weight when it is remembered that this protectorate is practically dependent for its revenues on one crop; a crop, moreover, whose

cultivation is more than ordinarily risky and whose produce is little more than a luxury. It is sincerely to be hoped that ere long a station for experimental cultivation may be founded under the direction of a competent specialist on tropical agriculture, on one of the many shambas which would be available for such a purpose, where other and equally remunerative forms of cultivation could be discovered and recommended, and where Arab landowners might be taught that it is useful and necessary to have more than one iron in the fire. With a fertile soil, a tropical climate, and a rainfall of from 60 to 100 inches a year, it would be surprising if this could not be effected at a comparatively small outlay and with lasting benefit to the country. The possible products of these islands have been so fully dealt with in Mr. Fitzgerald's Report on the Spice and other Cultivation of Zanzibar and Pemba Islands (No. 266, Miscellaneous Series, 1892) that it would be superfluous to recur to them in this report.

Desirability of experimental cultivation.

Labour is a question on which much has been written, but the importance of which to Zanzibar it is impossible to exaggerate.

Scarcity of labour.

The cultivation of the island is at present entirely carried out by domestic slaves, the supply of whom is constantly diminishing, and the Arab proprietor can neither, except with the greatest difficulty and danger, recruit raw slaves, as he did in former times, from the mainland, owing to the vigilance of our cruisers and of the local authorities, nor has he the available funds, even if he had the opportunity or the inclination, to hire labour elsewhere. The Indian money-lenders, to whom most of the estates are mortgaged, would be, if they were inclined to foreclose, in an even more powerless position, for they can neither command slave labour of their own nor is there any labour available for employment.

Tramway.

Hopes were at one time entertained that a tramway or a narrow-gauge railway line would be laid down through the most cultivated districts, and thus set free, for purposes of cultivation, many of the domestic classes who are now employed in carrying produce into the town on their heads, but although several firms have opened negotiations on the subject, no definite proposal has yet been submitted for the consideration of the authorities.

The results of this dearth of labour are deplorable. Not only are many plantations which would give a profitable crop allowed to run to seed, and others only picked in part, but many acres of valuable land have been allowed to fall altogether out of cultivation. It is universally felt that unless some energetic measures are taken, and taken soon, for the recruitment of foreign labour, not only will many of the clove growers be ruined and much valuable land be, if not entirely lost to cultivation, at least sadly deteriorated in value, but the financial future of the protectorate itself will be seriously threatened.

Fibre-extracting mills.

Mr. Rennel Rodd mentioned in his commercial report for 1892 that a new mill had been erected and started by an enterprising English firm for the extraction of cocoanut oil and fibre. It is naturally impossible to judge at such an early date as to whether this undertaking has proved financially a success or otherwise,

but it is satisfactory to be able to report that, in spite of the initial difficulties to which a new experiment of this description must always be subject, and of the extreme difficulty of obtaining any kind of skilled labour, the working of the mill still continues, and it is hoped that it will, in the future, be attended with satisfactory results.

Chillies. Chillies, which are cultivated to a considerable extent in the eastern portion of the island, and which, after cloves and copra, form its third most important product, were at a very low price throughout the year, and at the present time it is difficult to find a market for them at all.

Shipping returns. Annex IV, Table A. There is little difference between the shipping returns for 1892 and 1893. There is a slight diminution of both the number and the tonnage of ocean-going vessels that have entered this harbour during the 12 months under review, but this is exactly accounted for by the fact of the Portuguese line of mail steamers having ceased running. British shipping is still to the fore, as far as numbers are concerned, and falls but little short of German vessels in the matter of tonnage, but it must not be forgotten that the British lines of mail boats make Zanzibar their terminus, whereas both the French and the German lines proceed to ports further south, and again call at this port on their return journey.

The net register tonnage is taken, and each ship is only counted on entering the harbour, and not on leaving it.

Table B gives the returns of the coasting vessels which have touched at this port, while Table C shows the number and nationality of the foreign men-of-war which have anchored in these waters.

Harbour service. Under the able management of Captain Agnew, R.N.R., port officer to the Government of His Highness the Sultan, in succession to Commander Hardinge, R.N., the harbour service has been most efficiently carried on, and has in several ways been improved. The port rules and boat tariff have been revised, and the different anchorages clearly defined; the shore boats are all registered and numbered, and their crews kept under proper supervision; the beach is kept clean, and order maintained by an efficient staff of water police; and a slip has been constructed for hauling up small lighters and steam launches. The registration of native canoes has also been taken in hand, and there are now some 160 of these craft on the registers, all of which are licensed and numbered. A most strict control is maintained over dhows and native vessels, of which there are now 414 belonging to this port, representing a tonnage of 9,164 tons, and manned by 2,943 men and boys.

Lighthouses. The Zanzibar Government are not in a position to do more than keep the present lighthouses, which are provided with lights of a very inferior description, in a moderate state of repair; it is much to be regretted that the opposition of one of the treaty Powers prevents a small tax being imposed on all ships entering this harbour with a view to putting and keeping the lighthouses in a thorough and reliable state of efficiency, and to effecting other reforms in the service of, and the approaches to, this harbour.

Annex I.—Summary of Imports for the Year ended December 31, 1893

Articles.	Europe.		America.		Asia.		Africa.		Total.	
	Packages.	Value.	Packages.	Value.	Packages.	Value.	Packages.	Value.	Packages.	Value.
		Rupees.		Rupees.		Rupees.		Rupees.		Rupees.
Ammunition	21	3,020	...	...	1	30	...	...	22	3,050
Animals	...	...	...	...	768	22,171	14,971	194,057	15,739	216,228
Arms, fire	209	24,041	...	...	76	2,039	6	110	291	26,190
Bags and candas	7	576	...	...	829	71,402	3,837	26,300	4,673	98,278
Beads	967	107,061	...	...	272	25,602	48	2,935	1,287	135,598
[illegible]	...	...	...	...	...	...	481	399	481	399
Building materials	1,417	14,426	...	...	50,722	3,305	6,731	1,991	58,870	19,722
[illegible]	...	...	...	...	1	15	17,487	101,241	17,488	101,256
Cloves*	...	...	...	...	...	...	370,482	2,003,791	370,482	2,003,791
,, stems	...	...	...	...	...	...	31,975	23,020	31,975	23,020
Coir, twist and thread	19	8,440	...	...	723	33,160	10,806	23,207	11,548	64,807
Copra and chickichiki	...	...	...	...	...	...	98,619	329,354	98,619	329,354
Crockery and glassware	1,461	63,512	...	...	19,142	31,664	747	6,460	21,350	101,636
Carriages	2	590	...	...	4	1,705	17	1,600	23	3,895
Cotton	343	119,952	...	...	219	2,977	1,206	6,588	1,768	129,517
Cocoa-nuts	...	...	...	...	...	...	1,204,079	119,944	1,204,079	119,944
Coals	13,929	546,546	...	...	...	...	88	87	14,017	546,633
Coins	14	42,500	...	...	146	622,973	1,800	530,639	1,960	1,196,112
Dates	...	...	...	...	22,209	52,364	620	962	22,829	53,326
Dry fish and shark fins	19	133	...	...	65,079	145,573	4,014	13,809	69,112	159,515
Firewood	...	...	...	...	...	...	...	42,026	...	42,026
Flour	1,857	43,082	...	...	10,592	144,964	132	494	12,581	188,540
Ghee	...	...	...	...	7,642	269,689	4,192	106,898	11,834	376,587
Grain	119	1,811	...	...	99,758	886,305	270,444	685,155	370,321	1,573,271
Grocery	29,908	343,244	8,105	15,283	23,658	359,479	39,316	100,880	100,987	818,886
Ground-nuts	...	...	...	...	...	...	2,136	2,197	2,136	2,197
Gum copal	...	...	...	...	5	10	6,548	240,624	6,553	240,634
Hardware	23,252	226,897	500	1,500	22,500	122,246	936	3,481	47,188	354,124
[illegible]	1	105	...	...	570	3,000	11,103	48,354	11,674	51,459
Hippopotamus' teeth	...	...	...	...	...	...	608	37,120	608	37,120
[illegible]	...	...	...	...	108	22,500	18,000	2,400,000	18,108	2,422,500
Mineral water	562	13,760	...	...	42	803	23	740	627	15,303
Miscellaneous	3,776	211,096	...	...	5,276	283,500	21,718	90,761	30,770	585,357
Mother of cloves	...	...	...	...	...	...	1,700	1,700	1,700	1,700
Mourah seeds	...	...	...	...	70	315	...	...	70	315
Opium	...	...	...	...	61	30,500	1	40	62	30,540
Orcuilla weeds	...	...	...	...	211	2,777	17,130	102,457	17,341	105,234
Paint, oil, and turpentine	2,421	35,477	...	...	504	14,919	272	682	3,197	51,078
Petroleum	...	...	95,182	314,528	...	...	2	7	95,184	314,535
Piece-goods	3,415	1,174,352	3,749	437,608	13,482	220,608	435	45,482	21,081	1,878,050
Rhinoceros' horns	...	...	...	...	...	...	253	18,944	253	18,944
[illegible]	...	...	...	...	...	...	2,468	111,234	2,468	111,234
Salt	68	1,068	...	...	11,936	7,873	7,349	7,349	19,353	16,290
Shells and cowries	...	...	...	...	5	75	1,288	1,849	1,293	1,924
[illegible]	...	...	...	...	91	455	20,000	151,000	20,091	151,455
Spirits	5,384	72,389	...	...	267	4,075	55	2,575	5,706	79,039
Tobacco	677	83,076	...	...	196	16,521	57,676	76,720	58,549	176,317
Tortoise-shells	...	...	...	...	22	1,200	333	6,667	355	7,867
Vegetables	11,575	41,197	...	...	24,749	36,757	7,319	2,000	43,643	79,954
[illegible]	...	...	...	...	1	40	27	1,125	28	1,165
Wine	6,745	170,922	...	...	176	4,211	126	1,580	7,047	176,713
[illegible]	1	1,000	...	...	6	1,500	47	2,500	54	5,000
Wooden works	10,146	87,644	...	...	31,717	128,419	36,583	2,000	78,446	218,063
Total for 1893	119,187	3,552,696	107,836	768,919	413,568	8,545,000	2,230,297	9,410,615	2,870,888	22,277,230
,, 1892	148,120	3,769,937	97,230	777,582	413,786	6,550,820	1,780,787	7,940,615	2,439,923	19,039,954
Increase in 1893	...	...	10,606	...	...	...	...	769,800	...	3,237,276
Decrease in 1893	28,933	217,039	...	8,663	200	1,014,820	4,466,125	...	4,569,035	...

* Cloves are here reckoned in frasilas of 35 lbs., not in packages of 140 lbs.

Showing total decrease of 617,129 rupees as compared with 1892.

N.B.—The package equals 4 frasilas of 35 lbs., or 140 lbs. for cloves. In other [illegible]

(1747—to face p. 9.)

Annex II.—Summary of Exports for the Year ended December 31, 1893.

Articles	Europe.		America.		Asia.		Africa.		Total.	
	Packages.	Value.	Packages.	Value.	Packages.	Value.	Packages.	Value.	Packages.	Value.
		Rupees.		Rupees.		Rupees.		Rupees.		Rupees.
Amber	...	...	...	...	11	13,137	...	...	11	13,137
Ammunition	...	...	...	...	60	140	72	11,502	132	11,642
Animals	...	...	...	...	4	120	1,241	26,600	1,245	26,720
Arms, fire	1	25	...		1,955	40,252	190	38,800	2,146	79,077
Bags and candas	...	...	...		81	700	1,197	18,815	1,278	19,515
Beads	...	...	...	...	6	5,05	1,740	115,891	1,746	115,941
Beer	...	...	...	...	1	10	10	97	11	107
Building materials ...	...	...	...	...	330	1,170	2,857	4,800	3,187	5,970
Chillies	2,406	11,031	...		210	2,445	630	16,905	3,246	30,381
Cloves*	9,183	916,278	1,879	107,071	38,897	1,156,193	248	8,370	50,207	2,187,912
,, stems ...	1,275	64,500	1,500	14,198	2,601	10,668	...	...	13,376	89,366
Coals	6	42,405	...		1,250	1,110,150	1,131	705,651	2,387	1,857,206
Coir, twist and thread ...	1,428	16,605	...		245	725	7,317	31,524	8,990	48,854
Copra and chickichiki	107,167	1,491,191	...		1,858	18,959	43	910	109,068	1,511,060
Crockery and glassware...	1	40	...		16	132	6,361	61,861	6,378	61,973
Curiosities	...	...	...		...	...	16	1,000	17	1,000
Cotton	21	27	...		685	4,545	317	3,751	1,023	8,323
Cowries	10	8	...		23,804	12,470	89,448	91,894	113,272	104,372
Coal	...	...	...		...	...	...	...	...	...
Drugs	...	...	...		31	56	14,175	28,864	14,206	28,920
Dry fish and shark fins ...	...	...	...		238	21,894	29,597	31,951	29,835	53,845
Firewood	...		...	...	...	40	...	800	...	840
Flour	...	...	...	...	21	280	1,572	105,470	1,593	105,750
Ghee	...	...	...		2	2	4,605	188,005	4,607	188,007
Grain	1,091	1,818	...	...	11,980	64,174	113,859	102,882	126,877	168,874
Grocery	67	2,016	...	...	2,439	25,457	80,677	344,511	83,183	372,084
Gunny bags	93	465	...	...	31	310	1,648	4,378	1,772	5,153
Gum copal...	512	139,605	512	80,637	182	11,445	197	2,400	1,403	234,087
Hardware	1	22	...	...	173	1,040	10,302	110,111	10,476	111,173
Hides	495	76,500	234	40,200	146	7,302	214	4,614	1,089	128,616
Iron, plates and bars	40	12,131	...	...	60	1,420	8	960	108	14,511
Ivory	1,000	67,068	44	26,717	1,077	80,183	21	2,145	2,142	176,113
Mineral waters	...	...	...	...	...	...	2,000	12,000	2,000	12,000
Mother of cloves...	10	20,850	...	...	848	56,800	3,318	277,977	4,176	355,627
Mother of cloves...	...	...	...	...	186	1,117	...	...	186	1,117
Opium	...	...	...	...	...	...	14	840	14	840
Oilcakes, kernels	2,100	170,188	...	...	...	...	20	400	2,120	170,588
Paper, and imitations	...	...	...	...	10	97	2,999	21,041	3,009	21,138
Provisions	...	...	...	...	...	...	60,480	325,041	60,480	325,041
Piece goods	10	3,002	...	...	216	28,982	84,034	1,399,320	84,260	1,431,304
Rattans	2	840	...	...	90	1,772	4	1,020	106	3,632
Rice	2,400	6,000	70	2,800	2	300	4	192	2,476	9,292
Silk	...	...	...		...	...	47,185	16,518	47,185	16,518
Sandalwood	1,000	12,000	...	...	1,210	12,005	197	1,108	2,407	25,113
Tobacco	200	2,511	...	...	5,800	61,180	902	14,000	6,902	77,691
Tortoise	...	...	...	...	24	450	4,230	41,852	4,254	42,302
Vessels	1	40	...	...	197	1,800	2,229	63,295	2,427	65,135
Wax	95	41,000	1	1,700	7	1,000	4	80	107	43,780
Vegetables	4	12	...	...	840	1,200	17,840	42,000	18,684	43,212
Wax	4	1,200			42	7,000	7	400	53	8,600
Wine	2	60	...	...	100	1,200	4,744	93,854	4,846	95,054
Wire	...	...	...	...	18	1,070	800	11,000	818	12,070
Woollen goods	1,400	4,000	2,130	15,841	5,140	8,500	20,021	70,400	28,691	98,741
Total for 1893	36,245	4,265,476	5,450	435,213	120,000	5,407,000	466,000	7,000,000	627,695	17,107,689
,, 1892	28,000	3,000,000	4,000	300,000	100,000	4,000,000	400,000	6,000,000	532,000	13,300,000
Increase of 1893	8,245	1,265,476	1,450	135,213	20,000	1,407,000	66,000	1,000,000	95,695	3,807,689
Decrease in 1893	3,755	...	...	4,787	...	...	...	...	3,755	...

* Cloves here reckoned in packages of 140 lbs., not in frasilas, as in Import Returns.

Showing total increase of 1,503,907 rupees as compared with 1892.

Annex III. — Statement of Income of H.H.'s Government Cust

1893.	Imports.		Exports.		Italian Ports.		Declarations.		Wharf Rent.		Customs.			Scale Fees.	Ivory Stamping.	Rent Account.	Pass Writing.	Guns Registration.	Leaves Market.	Hamalage.	Pemba Cloves.	Zanzibar Cloves.	Chillies.	Mother Cloves.	Cloves Stems.	Kero Gods
	H. H. the Sultan's Dominions.	Foreign Countries.	Pemba.	Benadir.	Imports.	Exports.	Imports.	Exports.	Imports.	Exports.	Malindi.	Gulioni.	Kokotoni and Mándá.													
	Rs. a. p.	Rs. a. p.	Rs. a. p.	Rs. a. p.	Rs. a. p.	Rs. a. p.	Rs. a.	Rs. a.	Rs. a. p.	Rs. a. p.	Rs. a.	Rs. a. p.	Rs. a. p.	Rs. a. p.	Rs. a. p.	Rs. a. p.	Rs. a. p.	Rupees.	Rs. a. p.	Rs. a.	Rs. a. p.	Rs. a. p.	R. a. p.	Rs. a. p.	Rs. a. p.	R
January	3,611 1 3	268 12 3	1,689 15 3	1,623 10 0	...	...	835 12	596 4	1,503 2 0	24 6 6	...	14 2 9	13 12 0	228 13 6	197 10 3	361 9 6	62 0 0	8	600 0 0	29 1	11,464 12 3	11,443 0 3	1,090 9 0	199 5 6	...	
February	1,626 11 0	537 7 6	2,968 8 6	116 12 0	...	...	841 8	577 12	1,834 2 6	18 11 6	...	3 8 6	10 0 0	229 1 0	194 7 6	394 8 0	50 14 0	19	600 0 0	14 9	33,569 11 0	29,677 5 9	1,288 1 0	...	2,331 14 6	
March	5,355 14 3	1,148 4 0	2,772 8 9	1,341 14 6	...	...	1,258 8	757 12	4,275 0 3	34 2 3	...	13 12 0	10 4 0	229 10 0	397 9 0	815 8 3	68 2 0	20	600 0 0	9 2	23,206 7 9	15,707 2 0	...	...	1,007 0 0	
April	2,622 2 0	1,538 8 6	2,129 10 6	2,592 6 0	...	...	867 0	571 12	879 3 6	103 5 9	...	109 4 6	3 9 0	192 9 6	292 13 3	503 14 6	46 10 0	3,139	600 0 0	9 10	4,266 5 3	...	386 8 6	...	659 8 0	3,18
May	632 4 9	1,696 8 6	733 4 9	3,293 12 3	...	...	670 0	604 8	1,550 9 9	16 11 6	...	47 1 0	3 3 0	248 15 0	264 9 9	423 1 6	69 12 0	21	600 0 0	2 14	14,616 11 6	1,703 2 0	1,569 0 0	166 6 0	1,301 0 0	
June	858 4 0	1,330 8 6	1,636 10 0	...	...	...	672 4	467 8	2,416 4 0	33 7 6	...	26 3 3	3 7 0	147 0 6	439 9 0	400 14 0	68 0 0	9	600 0 0	12 3	15,103 14 0	876 9 6	...	59 9 3	334 9 6	
July	619 10 6	615 8 9	1,707 15 6	...	...	...	821 12	577 8	1,584 1 0	21 3 6	...	37 8 6	6 14 0	247 12 9	384 11 6	347 13 3	85 12 0	1,020	629 15 6	5 2	20,638 15 9	2,541 10 0	2,376 15 0	1 14 0	511 11 6	
August	113 15 0	1,531 9 9	2,424 0 0	...	...	1,513 8 6	870 0	517 8	1,711 5 6	30 6 6	...	24 12 9	...	385 9 3	565 3 0	226 9 0	76 10 0	141	743 15 0	8 14	2,410 10 3	7,872 11 9	1,162 5 6	3 6 6	309 6 0	3,72
September	105 12 0	1,441 1 9	2,580 2 9	...	...	1,233 10 6	875 8	713 12	1,774 12 3	40 4 3	...	9 12 6	10 4 0	521 6 0	346 10 6	533 2 3	85 2 0	533	852 7 6	2 0	24,001 9 3	11,581 7 9	905 13 3	40 9 6	74 1 9	
October	206 0 9	2,108 4 0	3,096 13 3	...	4,661 13 0	1,816 9 0	1,012 12	698 8	1,982 15 3	54 6 0	...	4 15 6	...	687 9 9	766 11 6	982 0 0	79 12 0	22	771 2 0	11 5	42,789 3 3	17,801 8 0	1,269 14 6	...	16 0 6	
November	1,273 1 6	1,659 2 3	2,890 12 0	...	2,239 14 6	877 6 9	860 12	590 0	2,342 3 9	6 10 0	1,694 12	32 7 6	26 11 0	628 3 9	165 7 6	948 11 3	61 2 0	20	730 14 0	2 0	60,728 2 9	13,592 5 0	586 3 6	...	362 15 6	
December	343 12 9	1,605 11 3	1,861 8 9	...	203 5 6	706 5 3	1,108 4	679 8	2,010 0 9	36 3 0	...	18 11 9	32 12 6	631 1 6	878 12 9	1,145 11 9	81 10 0	36	686 9 3	...	69,605 9 0	29,958 0 3	...	...	164 2 3	2,14
Total, 1893 ..	17,368 9 9	15,481 7 0	26,491 14 0	7,968 6 9	7,110 1 0	6,147 8 0	10,694 0	7,352 4	23,863 12 6	419 14 3	1,694 12	342 4 6	120 12 0	4,377 12 6	4,894 3 6	7,083 7 3	835 6 0	4,988	8,014 15 3	106 12	3,22,402 0 0	1,42,754 14 3	10,635 6 3	471 2 9	7,072 5 6	9,05
,, 1892 ...	36,451 2 9	29,896 8 3	19,267 13 0	20,269 4 3	...	...	9,803 12	6,722 8	13,585 7 3	172 12 6	...	215 2 6	136 5 6	4,111 15 3	5,662 5 6	8,873 5 3	593 15 3	382	6,600 0 0	217 4	2,93,391 13 3	1,63,740 4 9	10,087 6 9	135 0 6	4,994 10 0	8,12
Increase, 1893 ...	...	...	7,224 1 0	...	7,110 1 0	6,147 8 0	890 4	629 12	10,278 5 3	247 1 9	1,694 12	127 2 0	...	265 13 3	...	1,789 14 0	241 6 9	4,606	1,414 15 3	...	28,410 2 9	...	547 15 6	336 2 3	2,077 11 6	92
Decrease ...	19,082 9 0	14,415 1 3	...	12,300 13 6	...	...	...	...	...	...	...	...	15 9 6	...	768 2 0	...	...	...	...	110 8	...	20,985 6 6	...	...	...	...

RECAPIT

Net receipt paid into Treasury on account of
Ditto, Italian B. ports ... ...

Total ... ...

Paid into Treasury on Government account,

Decrease in 1893 ... ...

(1747—to face page 9.)

om-House for the Year 1893, compared with the Year 1892.

sine on.	Unclaimed Goods.	Deposit Account.	Over Work.	Auction Commission.	Pemba Refund.	Fish Market.	Shops Rents.	Duty on Copper Pice.	Lighterage.	Export, Zanzibar Island.	Transhipment Labour.	Duty on Potatoes.	Post Parcels.	German Coast Income.	Transhipment Passes.	Paid from Treasury into Customs Account.	Balance of 1891 Brought Forward and Paid in January, 1892.	Total.	Deduct.									Paid into Government Treas:	
																			Duty Returned.	Hamalage.	Deposit Returned.	Over Work.	Shipping Charges.	Kerosine Godown.	Wharf Rent Refund.	Expenses.	Difference Returned.	Bad Debt.	On Account of Italian Ports.	On Account Zanzibar Government
a.	Rs. a.	Rupees.	Rs. a.	Rs. a. p.	Rupees.	Rs. a. p.	Rs.	Rs. a.	Rupees.	Rs. a. p.	Rs. a.	Rs. a.	Rs. a. p.	Rs. a.	Rs. a. p.	Rs. a. p.	Rs. a. p.	Rs. a. p.	Rs. a. p.	Rs. a. p.	Rupees.	Rs.	Rs. a.	Rs. a.	Rs. a.	Rs. a.	Rs. a. p.	Rs. a. p.	Rupees a. p.	Rupees a
	...	...	...	196 10 3	...	...	...	...	...	...	...	...	...	...	...	...	...	36,062 5 6	16 4 9	2 8 0	...	...	...	...	...	...	...	...	...	36,013 8
	...	50	...	16 5 0	...	...	...	...	...	...	...	...	...	...	...	...	...	76,970 14 3	...	3 9 0	25	8	...	...	...	...	...	...	...	76,934 5
10	13 1 6	150	...	19 10 3	...	...	...	...	...	...	...	...	...	...	...	...	...	59,137 2 6	...	5 2 9	25	...	...	...	...	...	...	...	...	59,106 15
	217 10 0	...	35 0	...	...	...	...	...	...	...	...	...	...	...	...	...	...	24,882 2 6	...	6 15 0	175	...	37 10	...	...	...	...	...	...	24,662 9
	...	...	7 8	64 13 6	3	...	...	...	...	...	...	...	...	...	...	...	...	29,487 1 3	...	1 10 0	100	...	...	...	...	...	...	...	...	29,385 7 3
	...	...	27 8	25 11 0	...	...	...	...	...	...	...	...	...	...	...	...	...	25,571 2 6	...	13 9 0	15	...	...	...	...	...	...	...	...	25,542 9 6
4	6 0 0	50	...	30 14 6	...	...	...	...	...	...	...	...	...	...	...	...	...	34,837 10 0	...	4 10 3	...	...	...	...	...	...	...	...	...	34,832 15 9
	4 4 0	2,250	60 0	9 11 3	152	...	45	...	...	...	...	...	...	...	...	...	...	26,451 8 9	...	5 0 0	...	...	...	...	...	...	...	...	...	26,446 8
8	...	200	43 0	109 13 9	...	...	...	...	...	...	...	...	...	...	...	...	...	50,783 5 0	...	...	150	...	...	...	5 2	...	...	...	1,233 10 6	49,394 8
	...	668	...	1 13 3	...	...	...	...	...	...	...	...	...	...	...	...	...	81,195 9 0	24 0 0	...	2,475	...	...	...	...	...	...	...	6,478 6 0	72,218 3 0
8	...	390	36 0	29 2 3	...	211 13 9	...	...	...	...	...	...	...	...	...	...	...	92,989 11 9	2 12 9	...	508	...	...	...	...	...	...	...	3,117 5 3	89,361 9
																		1,14,608 3 9	3 12 0	...	430	...	...	173 4	...	...	...	...	914 10 9	1,13,086 9 0
14	240 15 6	3,833	236 0	511 2 6	155	211 13 9	45	...	...	...	...	...	...	...	...	...	...	6,52,976 12 9	46 13 6	43 0 0	3,903	8	37 10	173 4	5 2	...	...	...	11,744 0 6	6,37,015 14 9
2	875 8 6	...	46 0	617 11 3	...	...	...	1,562 8	21	102 5 9	99 4	4 6	147 3 3	96 9	118 13 3	7,675 3 6	95,268 3 6	7,50,673 10 6	...	48 12 9	...	...	...	...	...	2,801 7	929 2 9	485 10	...	7,46,408 0 0
2	...	3,833	190 0	...	155	211 13 9	45	...	...	...	...	...	...	...	...	...	...	...	46 13 6	...	3,903	8	37 10	173 4	5 2	...	...	...	11,744 0 6	...
	634 9 0	...	...	106 8 9	...	...	...	1,562 8	21	102 5 9	99 4	4 6	147 3 3	96 9	118 13 3	7,675 3 6	95,268 3 6	97,696 13 9	...	5 12 9	...	...	...	...	...	2,801 7	929 2 9	485 10	...	1,09,392 1 3

ATION.

	Amount.
	Rupees a. p.
ernment in 1893 ...	6,37,015 14 9
... ...	11,744 0 6
... ...	6,48,759 15 3
... ...	6,51,139 12 6
... ...	2,379 14 3

Another reform which is urgently needed is the proper administration of the customs of the island of Pemba, where there exists, at the present moment, an administration in name only, and little or no control. It can hardly be doubted that if this were thoroughly taken in hand, it would not only soon cover the cost of the initial outlay and the working expenses, but would add considerably to the revenues of the country, and might possibly be the means of opening up to trade what is by no means the least fertile part of this protectorate. Pemba Island.

In reviewing the statistical returns for the past year, it must not be forgotten that for the greater portion of it the Benadir coast was in so unsettled a condition that trade was practically at a standstill, that disturbances have occurred at Witu and Kismayu, and that there have been risings in more than one portion of the German sphere. All these must have had their effect on the revenues of the country and on the commerce of the central market of East Africa. Concluding remarks.

In conclusion, it must be borne in mind that these carefully classified and detailed statistics have, in the short space of two years, either been evolved out of what was formerly a chaotic confusion of unintelligible and unmeaning accounts, or have been compiled and arranged by hard work and perseverance, without the assistance of one single figure or one record of past years. To Mr. Strickland, and to those working under him, is due all credit for the ability and zeal by which they are making it an easy task to trace the commercial history of Zanzibar.

Annex IV.—Table A.—SUMMARY of Ocean-Going Vessels that have Entered the Port of Zanzibar for the Year ending December 31, 1893.

Period.	British.		French.		German.		Portuguese.		American.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
January 1 to March 31, 1893 ..	11	10,118	6	9,704	9	14,369	5	8,725	1*	1,176
April 1 to June 30, 1893	9†	8,501	7	12,043	9	14,915	2	3,008	1*	1,102
July 1 to September 30, 1893 ..	14	22,208	7	12,698	9	14,547	Nil.	..	Nil.	..
October 1 to December 31, 1893..	11	17,656	7	11,635	10	15,694	..	..	1*	831
Total	45	58,483	27	45,480	37	59,525	7	11,733	3	3,109

Period.	Norwegian.		Swedish.		Zanzibar.		Total.	
	Number of Vessels	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
January 1 to March 31, 1893	Nil.	Nil.	1*	340	2	2,332	35	46,764
April 1 to June 30, 1893	1*	336	..	..	1	911	30	40,816
July 1 to September 30, 1893	1*	2,000	Nil.	..	3	3,243	34	54,696
October 1 to December 31, 1893 ..	1*	290	..	..	..	..	30	46,106
Total..	3	2,626	1	340	6	6,486	129	187,782

* Figures marked with an asterisk are sailing vessels.

† Including 1 sailing vessel.

Annex IV.—Table B.—SUMMARY of Coasting Vessels that have Entered the Port of Zanzibar for the Year ending December 31, 1893.

Period.	British.		German.		Portuguese.		Zanzibar.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
January 1 to March 31, 1893 ..	3	303	30	4,680	2	416	3	602	32	6,001
April 1 to June 30, 1893	4	338	26	3,783	1	208	5	1,404	37	5,733
July 1 to September 30, 1893 ..	4	432	26	3,762	Nil.	..	10	2,340	40	6,534
October 1 to December 31, 1893..	5	358	20	2,976	Nil.	..	6	1,404	31	4,738
Total	16	1,431	102	15,201	3	624	24	5,750	146	23,006

Annex IV.—Table C.—SUMMARY of Men-of-War that have Entered the Port of Zanzibar for the Year ending December 31, 1893.

Period.	British.	French.	German.	Italian.	Portuguese.
January 1 to March 31, 1893 ...	11	6	15	...	...
April 1 to June 30, 1893 ...	22	2	6	1	...
July 1 to September 30, 1893 ...	17	2	4	2	1
October 1 to December 31, 1893	11	4	8	2	...
Total	61	14	33	5	1

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